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ABSTRACT

Designed to help community colleges create and operate a business center to serve local employers, this booklet provides information, illustrations, models, and insights to encourage the establishment of new outreach programs into the business community. Section I offers guidance on planning a business center for economic development and job training services, setting forth the roles and activities of the office, suggesting ways of measuring state and local support, and presenting guidelines for identifying needs and resources. Section II deals with the organization of the center, outlining requirements for personnel, facilities, and operating systems. Section III looks at the process of building an outreach system to market the center to the local business community. It explains how to obtain and use business data, build a sales or visitation team, and produce printed materials. Section IV includes a primer on training, suggestions for making initial contacts, and guidelines for planning and proposing on-site services. It also offers guidance on conducting a training needs assessment, designing a training program, writing a service proposal and contract, and delivering services. Finally, section V presents brief descriptions of successful collaborative efforts. Sample forms and agreements are appended. (AYC)

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TWO-YEAR COLLEGES: DOING BUSINESS WITH BUSINESS

A HANDBOOK FOR COLLEGES PLANNING TO SERVE COMMERCE AND INDUSTRY

RUSSELL HAMM
THE COLLEGE OF LAKE COUNTY
GRAYSLAKE, ILLINOIS

LYNN TOLLE BURGER
THE ILLINOIS COMMUNITY COLLEGE BOARD
SPRINGFIELD, ILLINOIS

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Suite 410, One Dupont Circle, NW
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PREFACE

The last twenty years have been a time of unquestioned change in work and the nature of work. The speed and complexity of this technological transformation and the inability of American leaders to grasp the significance of the change have left the U.S. economy in vulnerable and defensive positions. This condition has been further exacerbated by an unfavorable balance of trade, poor rates of exchange, and worldwide industrial competitors who have coupled low wage requirements with automated manufacturing to become more productive and competitive.

AMERICAN EMPLOYERS RESPOND

A result of this condition is that U.S. industries are having to undergo the most significant transition since the industrial revolution. In response, employers are focusing attention on several broad strategies:

- *Changing production processes.* This is aimed at reducing high labor costs, primarily by introducing automation, and improving planning and quality control.
- *Adapting flexible specialization.* This replaces the concept of mass production with the ability to produce a wide variety of specialized products and parts. Rather than make a few things repeatedly, and be able to quickly redesign, retool, and modify production processes, industry must be able to produce a large number of unique and special high-quality, value-added products.
- *Product diversification.* This is a move away from traditional "smoke stack" or metal fabrication/assembly products and toward a wide new range of products where industry, using superior research and development abilities, can compete. Among these new technologies are the information technologies (microelectronics, computer hardware, software, and telecommunications); production automation systems; health and medical technologies, biotechnologies; and the use of new materials.
- *Worker training and retraining.* Employers are increasingly investing in human resource development. Leaders of business and industry are quickly coming to the conclusion that investments in worker training and retraining may pay larger dividends than other forms of investment.

These strategies exact extremely high costs for government, industry, educational institutions, and employees. Formidable capital infusions, staggering infrastructure improvements, massive employee dislocation, and

the improvement of education/training delivery systems head the list of requirements. As companies struggle with new strategies, time-honored practices are being questioned and nontraditional methods and allies are being sought. The strategies above require both new ideas and information and a training/education system that is able to respond quickly, easily, and capably. As a result, employers, large and small, private and public, are strengthening ties to higher education.

COMMUNITY, TECHNICAL, AND JUNIOR COLLEGES RESPOND

Foremost among the new employer partners have been community, technical, and junior colleges. While the challenges are significant and the requirements both varied and difficult, the community colleges seem more able than other higher education institutions to meet the needs. Now, as in no previous time, a window of opportunity exists for community colleges to demonstrate their capacity for delivering technology, knowledge, and the skills to manage it.

In response, community colleges nationwide are playing an increasing vital role in job training and economic development, as key partners with government, labor, and business, not only to train people for jobs but also to help create and retain jobs. The affiliation of community colleges with commerce and industry is both longstanding and evolutionary. Traditionally, the role of community colleges has been to provide a skilled, educated workforce, with the students being the clients of the community college system. Commerce and industry were the beneficiaries of this education and training, as colleges prepared and supplied their workforce. Recently, the role of community, technical, and junior colleges has evolved and expanded to the extent that they are being relied upon as a principal vehicle to reinstate excellence, competitiveness, and improved productivity within the nation's manufacturing economy. This evolution from preparing the workforce for business (student as client) to conducting customized job training programs for commerce and industry (making the business the direct client) demonstrates the colleges' willingness to assume part of the burden for helping the U.S. be competitive in the world market.

In meeting this growing responsibility to the employer community, college economic development activities have blossomed into a full array of programs and services in job training technology transfer and industrial restructuring. Over the last few years, many community colleges have become established as partners in economic development efforts. In Illinois, community college economic development efforts assisted in the creation and retention of nearly 18,000 jobs in one year. In Ohio, the community college system has become an integral part in that state's comprehensive program of technology transfer.

Over the past several years community colleges in several states, with assistance from the AACJC and others, have helped create a working

support and delivery system for commerce and industry. Through the Keeping America Working project and with the support of the Sears-Roebuck Foundation, new partnership models have been identified and structures created at local college levels. The programs, usually offered through discrete offices within the colleges, have proven that community, technical, and junior colleges can deliver what employers require.

Recent data gathered by the National Council for Occupational Education indicate that many community colleges have yet to make a commitment to economic development and business service. The same study seemed to conclude that most felt that the new economic development initiatives were important. AACJC offers this monograph to facilitate and cultivate the creation of new local economic development initiatives. While a wealth of previous publications have described successful programs and assisted colleges in defining economic development, this publication offers additional assistance as it suggests a "blueprint" for creating and operating a college office to serve employers. Hopefully, it will provide information, illustrations, models, and insights to help your college establish new community outreach programs.

Dale Parnell
President
American Association
of Community and
Junior Colleges

SECTION I

PLANNING AN OFFICE FOR ECONOMIC DEVELOPMENT AND BUSINESS SERVICE

I

SETTING A COURSE OF ACTION

Your college may be in the process of deciding to join the ranks of community colleges that operate offices for economic development and business services, generally called business centers. Perhaps you have at least an initial concept of the business center: what functions it may serve, the general types of activities it can conduct, how it might fit into the institution and contribute to the community, and some idea of how to get it rolling. You are probably familiar with the general concept of a business center that provides direct training and services to businesses and assists with local economic development efforts, for example, through:

- Customized job training activities delivered to local commerce and industry;
- Entrepreneurship education and consulting services for potential and existing small businesses;
- Working with other local economic development organizations to attract and retain industry;
- Housing special job training and placement efforts such as those organized under the Job Training Partnership Act; and
- Conducting innovative efforts such as operating small business incubators, labor-management councils, or technology transfer programs.

As a community college staff member considering the requirements for opening a new office, you are faced with a wide variety of alternatives and challenges. Probably, though, the college has been interacting with local business for quite a long time, usually requesting the service of business people on advisory committees. Probably, too, the college has a number of faculty who have familiarity with the commercial and industrial world and will be useful in your initial discussions and preliminary planning sessions. The point is that you are very likely not starting in a completely foreign area and that some foundations have been prepared. Use these established resources, but do not assume that simply expanding traditional activities will suffice as a new economic development initiative.

At this point you need to conceptualize fully the business center as an appropriate enterprise for your institution and to develop a plan or "blueprint" for its implementation. To chart your plan of action requires:

- Some elementary planning and problem-solving techniques;
- A strong commitment from your institution to create an economic development program that is distinct and new to the college;
- A healthy portion of instinct coupled with some expertise learned from prior experience with local business; and

- Patience, persistence, and flexibility to initiate the center in its initial form and to refine it and help it evolve over the first few years.

Basically, the plan outlined includes most of the steps you will follow to open a center successfully. While this plan may serve as your blueprint for action, be aware that the steps cannot necessarily always be conducted in sequence. Rather, you will need to adapt the plan to fit within the processes and procedures of your college and subject it to the pressures of your community as it is designed. The chapters that follow will provide very concrete suggestions on how to complete and realize your plan.

1. **Conceptualize and visualize the office and its functions and be prepared to describe it to others.**

   As the individual taking the leadership for this project, you will carry the responsibility of helping other people understand and visualize this unique and discrete new office. Naturally, you must have some mental picture of what it will be and how it will function, and your vision must parallel that of the senior administrators within your college. A sense of the new office's mission, a concept of how the office will be organized and operate, and a perception of the payoffs and outcomes for the school and the community will be required as you proceed.

2. **Obtain the commitment of your administration and board to consider establishing a business center.**

   A great deal of work is involved, not to mention some resource allocation, in establishing a business center. This will include a heavy load in initial research and planning prior to determining what the business center function will be and actually setting up and operating the office. As early in the process as reasonable, you should confirm a commitment from your college's president and the board, minimally to consider the feasibility of establishing a center or preferably actually to commit to opening the unit. If you feel you have adequate commitment, move on to the next step. If that commitment is not solid, then conduct some basic information gathering necessary to make a better case.

3. **Identify needs and problems.**

   Identify the needs of area commerce and industry and the local economy to determine which ones the business center should attempt to serve.

4. **Identify resources.**

   Identify resources, such as faculty and administrative expertise with business and economic development, that you have in-house. Find assets within the community through the chamber of commerce, local economic development groups, the state and the local government, and from other educational institutions.

5. **Choose the role(s) your new office will play and the activities it will conduct in meeting the needs you have found that take advantage of the existing resources.**

   Determine if the college will identify its role strictly as an educational institution and decide to provide only instruction and training, or if it also sees a role in community service leading to significant involvement in the decision-making processes for community development. Discover if the college will be the sole leader in economic development or if other key players already exist with which the college should join as a team player. Perhaps most importantly, choose the initial roles with an eye for developing broader and more significant roles to grow into—start small but think big.

6. **Organize and systemize the business center.**

   Spend adequate time designing the systems that will enable your office to produce high-quality results routinely within the allotted time frames. Start with a role and a set of activities that will clearly be seen by the college, the business community, and the public as unique and appropriate to your institution—as part of the college's mission. This initial form of the business center should lay the groundwork as a successful and growing enterprise, much like a small business itself. For the business center's first project choose a guaranteed success to begin establishing the center's reputation. Look for something that will be visible, of high quality, and will produce positive results worth a publicity splash.

7. **Deliver a quality product.**

   Since quality education and services from community colleges are important and expected, the business center must assume to meet those expectations. The activities of the office will be under the heightened scrutiny of business people who will demand accountability and excellence.

8. **Refine, improve, and expand the business center.**

   The initial concept of your center should evolve and develop into something more comprehensive and probably something larger. If the office is truly "market-driven," you will become the provider of what is really needed by the business community. With an eye on the horizon and more than a little ambition, you will grow in importance to both the community and the college.

These steps are elaborated in subsequent chapters to provide basic how-to information and tips for a successful effort. What is offered has been learned by experience through the trials of a business center director and a state economic development coordinator with the help of many colleagues. Go for it!

II

DEFINING THE BUSINESS CENTER

The business center unit will coordinate and synchronize the college's economic development efforts and quite possibly the efforts of local government as well. Both its administrative identity and its success within and outside of the college depend upon the prudent identification of the activities it selects to pursue and the role it defines. Obviously, the location of your college, or, more specifically, the type of economic and business problems that exist in your environment, will impact the design of your office.

WRITING A MISSION STATEMENT

Not surprisingly, the most important initial aspect of defining the business center is writing a mission statement. More than an expected formality, it becomes crucial to the success of the center because it will directly impact the acceptance of the center in the business community. Key points to consider when creating the statement are:

1. The mission of the business center must be derived from the current mission statement of the college, although it will expand and further define mission.

   Since the focus of the college's mission statement is, naturally, education, the business center mission must also have an education orientation. Also found in most college mission statements is a commitment to community service. This directly supports the interest that a majority of business centers have in going beyond training to offer, at a minimum, specialized assistance such as small business counseling and management assistance. At a maximum, it enables the center to serve the economic development needs of the community by conducting any activity that contributes to the economic prosperity of the community.

   Another consideration is to ensure that the business center mission is anchored to the strengths and expertise of the college. Also, the degree to which a college engages in business assistance and economic development should be seen as a continuum, starting with education and training, leading into more service-oriented activities, and concluding with business and economic development leadership within the community. Once expertise has been established and the community has high regard for direct business service, it will expect the business center to participate in the decision-making groups that have community-wide significance.

   The point we emphasize is for the activities of the center to evolve and emerge from business education to more complex and varied enter-

prises. If the center attempts too many things too quickly, the reputation of the center may be unclear to the community at best, and at worst be jeopardized because of attempting to operate in areas without community acceptance or without the reputation that would result in natural acceptance. Start with education and training for business and then expand only as rapidly as the community will accept or offer new and additional roles.

2. The mission of the business center must complement existing local business and economic development activities.

   In defining its mission, the center must be cognizant of the mission and activities of the other local economic organizations, including the municipal and county governments, chambers of commerce, economic development corporations and commissions, regional planning bodies, and the like. Since the success of the office will ultimately depend on how it fits the community and its needs, you should expect to spend adequate time in discovering where you will play on the team.

3. The mission of the business center must be market-driven.

   Clearly, the mission of the business center, as reflected by the structure and programs of the office, should be built to meet most effectively the needs presented by your business community. The "new products" offered by this office must be the result of the application of classical marketing theory: discover needs and create products to fill them. The training, consulting, and assistance provided will be driven by real and discovered needs and not by the interests and demands of the college's staff or faculty. There is no one best way to accomplish this, but all ways should utilize business marketing principles. Take care to prevent the office from simply becoming a device to market and promote programs and services already in existence on campus, though later it may do so.

4. The mission of the business center must be results-oriented.

   The foremost reason for the existence of all business centers is to assist the economic recovery and growth of the local economy. In brief, the successes of the offices are judged by the impact you have on the unemployment statistics of your area and by the numbers of jobs that the office is able to retain or create. It is simple: cut unemployment by retaining or creating jobs by providing training and services to business and assisting with local economic development activities.

5. The mission of the business center must have an identity all its own.

   This new office must have a mission that is clear and significantly different from that of other offices in the college so as to facilitate its establishment as a fresh, new, college initiative. In later chapters a menu of activities will be presented that when pursued successfully will

accomplish the basic mission.

If fiscally possible, the college should consider creating a new unit with a separate staff to serve commerce and industry. While a few colleges can demonstrate the success of adding business service to the adult and continuing education program, it will be easier to convince business of your serious commitment to them by promoting a unique and discrete unit. Another obvious advantage is the creation of very specific expectations for staff to serve one client base without diffusing energy to other client targets. Later in this booklet the need for "separateness" will be further stressed in discussions of marketing tactics and fiscal management. Probably the single most important reason to have the office stand alone is to create the perception for the staff that the new office is very much like a small business with the same pressures and payoffs experienced by the center's own clients. The risks, the successes and failures, will facilitate the building of a true entrepreneurial spirit.

The name of the center should reinforce its new identity. Literally dozens of different office titles have been shown successful, leading to the belief that almost any name will work: Economic Development Center, Business and Professional Institute, Center for Professional Development, Business Training Center, Institute for Commerce and Industry, and more seem to have sufficed. The choice ought to please both staff and college administration and be distinct from other offices in the local environment. Once the choice is made the name should appear on everything connected to business service.

6. The mission should reflect the economic environment in which the colleges exists.

   The location of your college, or, more specifically, the type of economic and business problems that exist in your environment, will impact the design of your mission. Obviously, economic problems vary from one area to another, largely depending upon whether the area is rural, urban, or suburban in nature. The importance of the differences is examined more thoroughly in the following unit.

PART OF THE COLLEGE BUT DIFFERENT

This section is written to assist you in having a perception of your office that is unique from all other college offices. It is also designed to help you think about how you want your clients to view your office and its new functions. They must not be encouraged to view you and your staff as separate from the college, a view that would diminish your office's credibility, but they should view you as the facilitator or conduit to college help.

You will be able to bridge the differences, since the conducting of

business on campus is purposely disparate from that of the commercial and industrial world. The academic world encourages thoughtful participation by larger numbers of people over a longer period of time, whereas in the business world individuals, not groups, carry more responsibility for decision making. We imagine that you will enjoy the differences. Perhaps the single most noteworthy difference between how your office operates as opposed to the other college offices is the speed with which you respond to the needs of the commercial and industrial world. You should expect to move quickly, and demonstrate a "can do" image. Business personnel, most all of whom have been to college, generally expect a slow, thoughtful, scholarly approach to problem solving from educators. Although they probably have a good feeling about your college, they will not expect a "business" approach to be taken. Your thoughtful but speedy reply to their inquiries and needs will be both a surprise to them and a powerful and convincing tool for building your office image with the company.

One of the stresses you will encounter is having to work with equal efficiency within two worlds that move at different speeds. Remember, you are the connection between a business in the off-campus environment and a unit (perhaps the business division) on campus. You will frequently return in haste to campus feeling the pressure from the urgency of a company's request, only to find that your request for help must fit into the measured pace of some other office's procedures. A hasty meeting with your colleague may result in faster service the first few times you try, but ultimately that approach will wear thin. Perhaps the first conversation you have with your colleague should not address the particular problem you have but the fact that you may occasionally need a fast reply and need to know the best way to approach his or her office to obtain it routinely. Also, once having been helped, send notes of thanks to the assisting office and a note to that individual's supervisor. Build bridges, not walls, and don't leave land mines behind that will hurt you the next time!

Controlling Curriculum and Instruction

Most college instructors, living beneath the umbrella of "academic freedom," are accustomed to prescribing for students information and methods of learning that they independently believe to be important. While this is appropriate behavior for the classroom, it will not be suitable for commerce and industry. Here we note, then, another major difference between your two worlds: in industry, industry controls! Industry will expect to influence the training content, the choice of instructor, the delivery method, and the place and time of the activity, since industry will be paying the cost. When you interview instructors who may serve your needs in business, they must understand and agree to this change. This is not to say that the instructor or consultant will not heavily influence

what transpires; he or she will, but the final decision will be the companies'. We have, in a few cases, suspended communication with instructors who will not adapt to the differing expectations.

Fitting the Business Environment

There is another set of different expectations you may have to deal with. Numerous books and articles have provided insight for individuals concerned with donning proper attire for the business world. Permit us to reduce all that advice to this: Look like they do! For both ladies and gentlemen, conservative business suits are appropriate when you call on a company. The point to be made, then, is that you may need to coach your educational colleagues tactfully before they accompany you into the business world. The brightest and most promising instructor chosen for a company contract will fail the first interview if dressed in jeans. Consider meeting with new resource people the day before the company appointment to review the meeting agenda, to discuss strategy and client management, and to converse about the instructors' concerns. Near the end of this brief dialogue, look directly at your colleague, casually say, "Don't forget that this is a suit-and-tie affair," and smile warmly.

Exceptions, of course, include visits primarily conducted on the plant floor, where you will still wear a suit but your technician/colleague may choose to dress more like the employees with whom he or she will be working. Good taste and good sense will work every time.

How Industry Personnel May Expect You to Differ

It is true that company personnel will deal more easily with you if you seem to be more like them than an academic. However, you still will represent "college" and "education" to them, and they may expect some differences. They may sense, for example, that you care more about learning and teaching than you do about setting a price and closing a deal, or that excellence is more than a trend for you and your school. Do not disappoint them. It may very well be that you are going to be awarded an opportunity or a contract primarily *because* you come from the local community college. It is not likely that they will accept a sluggish schedule or response, but companies do expect quality.

DESIGNING YOUR OFFICE TO FIT YOUR TYPE OF COMMUNITY

Rural and Small-Town Economic Development

The location of your college in a rural or small-town environment will cause you to perceive your office differently than if you were in a more densely populated area. The odds are very strong that your office

may be the only (or one of few) economic development program for the entire area. You may, by default, become the lead agency for assisting or coordinating the economic improvements of your area. As such, you may be in a position to help the area define economic development and set goals and objectives. It may also require, at the beginning, that you sponsor meetings and conferences that act to educate local citizens and government leaders.

The problems facing rural areas today are significant, so the role you play will be of high importance. However, you will be faced with almost impossible challenges, especially if you are operating in an agrarian or mining area. The decline in these sections has forced incredible economic hardships to become a way of life for local citizens. Unemployment rates above 25 or 30 percent are not uncommon. In a sense, you must be careful not to raise expectations about the potential of your office beyond what is attainable. Your role may be to help the diverse parts of your service area to begin to work together, and you may be the glue that holds sometimes competitive leaders to a regional agenda.

There are other realities as well. With a scattered population you may be on the road considerably, and frequently at night, since most meetings are attended by individuals who have jobs and serve in official capacities on a part-time basis. You will lack the sheer numbers of people from whom you can draw an audience for workshops and conferences. Since you will host smaller audiences, you will need to define success differently. It will not be a crowded room necessarily, but it may be enough in helping just the right few people begin an initiative. Another challenge is to find resource people, since many of the folks you could use to teach and consult may have moved to areas with brighter employment potential.

Your business attraction program will be different from one in a highly populated area. You will be wiser to attract or assist in the startup of smaller businesses. It may be wiser to initiate plans for 10 companies of 15 or 20 employees than to spend lots of time trying to locate a single 200-employee plant. Diversity seems to be a safer investment. The infrastructure (roads, sewers, water, etc.) of your local area will probably host several small businesses more easily than one big company that might demand significant infrastructure improvements that the area could not afford. If you are currently a resident in this type of area, you already know that there is simply less of everything (except peace and quiet) and you will have to make, literally, something out of nothing. However, your successes (even modest ones) will get public attention and you will be appreciated. This is not often the case in other areas.

Suburban Economic Development

If your college serves a suburban area, then your role may likely be the economic development partner working with other very capable

agencies and government bodies. Your success will be judged by what you bring to the table to add to the economic development plans and mission of the region. Rather than lead your area, you will more often be a cooperating office or serve a coordinating function and will not be responsible for the entire package.

The college, as a neutral ground, can serve to bring diverse and competitive leaders or groups together. Probably the training, consulting, small business assistance, and other educational activities will be the basis of your program. Do not be surprised if after a period of successful partnership others in the community begin to turn to you and your office to be the lead partner. Focus on defining, operating, and promoting your chosen role and supporting programs, and let more responsible opportunities open themselves to you naturally.

Urban Econo Development

Those of you located in big cities will enter the economic development world in an entirely different manner. Your environment is probably confronting a multitude of complex problems, including high unemployment, a disintegrating and changing business climate, ethnic-based problems, infrastructures that are decaying, and a lack of resources with which to face any of these problems. Additionally, there may be no shortage of groups and government agencies that have declared themselves a part of the economic development game, frequently with agendas that are at cross-purpose with other groups and goals that will not universally assist the city. In this malaise you may be viewed initially as just another competitor seeking a piece of the action, and may find direct and indirect resistance (political and financial) to the programs you introduce. It will most likely be difficult, and it will require the very solid support of, and defense by, your administration. Without it go no further.

The most successful strategy we have found has been played by the City Colleges of Chicago. The several colleges, and especially the Business Institute of City-Wide College, seem to have found success by first deciding, within the institution, what roles to play and what programs to offer. This has been followed by operating model programs that gain the attention and respect of the business community and define the turf where the colleges can be successful. This model differs from a normal development strategy whereby a needs assessment is used to define a niche or position in the environment. Since the Chicago scene appears to be too complex in order to take an accurate scientific measurement of need, "street smart" college personnel make that determination themselves, build a program, and then seek cooperative relationships from a position of demonstrated success. Eventually, consortia are built, agreements are reached, turf is identified, and a sense of order becomes evident.

In this section we have shown that the design of the economic development and business service office is a factor of your environment. In any case, when you have designed programs that meet the needs of people in your district, you will become a leader, and your influence on the activities of your region will grow.

III

IDENTIFYING THE ROLES AND ACTIVITIES OF THE OFFICE

The role of the business center is largely defined in terms of the specific activities that the center conducts for a specific business market. A wide variety of possible activities for an even wider variety of markets is offered in this chapter to present the largest possible view for your consideration. To prepare you for selecting appropriately, a description of the activity is presented, followed by a review of the resources required to be successful. In reviewing these activities, remember that your business center should start with those activities that are most closely related to the mission of the college as an educational institution, build a solid reputation based on those activities, and then expand when appropriate.

CUSTOMIZED JOB TRAINING

What is it? Frequently called on-site or in-plant training services, customized job training programs are designed to provide business with precisely the type of training the firm requires; whatever the subject matter, the community college can design or broker a training program to fit the bill. It is provided under contract between businesses and community colleges to meet a variety of company needs. The course content, schedule, sometimes the choice of instructor, and duration of the training are controlled by the business. The company may desire a traditional semester schedule or need an intensive condensed course, or want training 24 hours a day to handle all shifts. Most of the training is conducted on-site at the company's facilities, but training also can be conducted on campus or at any off-campus site.

Customized job training can be designed to train new employees, keep existing employees up-to-date, or upgrade employee skills to maintain and increase company profitability. It can cover basic education, occupational skills, or management/administrative skills. Colleges that are able to deliver industrial technology training, such as automated manufacturing, computer-aided design, statistical process control, or materials management consulting and training, will find companies eager for help. Another frequent need is for supervisory skill training, which can often be taught with liberal arts faculty. Frankly, there is virtually no limit to the type of training required.

What resources are required? Basically, two resources are needed: staff who are able to call (like a sales call) on industry and understand the companies' needs, and a "resource bank" of qualified consultants and instructors. One competent, enthusiastic college representative (sales-

person) with strong communication skills and a smattering of industrial experience will provide a good "front end" for your office. If you are the whole office staff, then learn sales techniques and learn how to assess industrial training needs.

The instructors are specially chosen depending on the company's training needs. Most frequently, instructors are expert practitioners from the field who can provide training based on actual experience. They can be members of your own faculty or can be contracted to you and then serve in the plant. Most successful instructors have had business experience and are able to make the company's personnel feel confident about their work. Short on instructors? Call the chamber of commerce and ask for references, or place an ad in the paper, or call the manufacturers of equipment used in your client's company. In all cases, conduct a face-to-face interview.

In many cases, training is provided to assist with a plant location or expansion. This places the college in a very important position to provide the needed training and assist the company to develop in its area. In such situations, community colleges may be in a position to assist companies in seeking funding for the training through various state job training programs as well as through the Job Training Partnership Act (JTPA). It is very important for the college to help the company tap such resources if they are available, but be aware that most training is paid for entirely by the company.

HUMAN RESOURCE DEVELOPMENT; WORKSHOPS AND SEMINARS

What is it? Workshops and seminars offered by your office and promoted to a specific group of professionals are concentrated learning experiences that focus on one or two in-depth topics usually concerning recent developments or market changes. Varying from a half day to several days in length, they are offered to meet the needs of specific professionals, such as accountants, nurses and other allied health professionals, government managers, plant managers, engineers, and sales and marketing staff. The sessions are usually conducted by experienced professionals who have attained at least a regional reputation for being leaders within their fields. Most frequently, they are promoted through the use of direct-mail campaigns and telemarketing programs. Individuals, not companies, are the clients, and each is charged a fee for attendance. Fees vary with the topic, the audience, and the cost of the presenter, and will range from a low of about $30 a day to more than $300.

What resources are required? Foremost is the need for a list of names and addresses of the potential attendees. These can be gathered by using the phone directory, purchased from direct-mail houses, or frequently obtained from state offices that license or certify certain professions. Without

a reliable and sizable list your project will not succeed.

Second, you must obtain a good presenter, and this is usually (and easily) done by calling other colleges, professional offices, or state agencies and asking for recommendations. Eventually, you will establish a network of people, like yourself, who will make suggestions.

Next, you will need to design and have printed a direct-mail piece. Collect a few from other colleges, so that you have a sense of what should be included on the brochure, gather the information, and take it to a reputable print shop. Spend the extra dollars and make it look professional.

Hosting a conference requires an adequate room (possibly bread-out rooms, too), refreshment and luncheon service capability, restrooms, telephones (to call back to the office), parking, and other amenities. A satisfied conference client will have heard a good presentation, been well fed, and feel as if you tried to make the experience first rate.

SMALL BUSINESS ASSISTANCE

What is it? Primarily, small business assistance is the ability to deliver information and counseling to owners and operators of small retail and service businesses or to individuals who are planning to start a new business. Occasionally, this service may include assisting in the creation of a new manufacturing company, although most community colleges soon seek state or federal help when the new company is ready to seek seed capital or venture funding. Assistance to small business can comprise many forms, such as workshops, seminars, and regular course offerings that are held on a wide variety of topics of interest to the entrepreneur (starting and operating a small business, business applications of computers, small business financing, accounting, personnel management, etc.). While many community colleges have limited their small business assistance to workshops and seminars, others have incorporated entrepreneurship courses into their regular curricula, and some have established small business certificates and degree programs.

Community colleges also may provide direct consulting services to businesses through various methods. Increasingly, colleges are hiring small business counselors who provide the consulting service themselves as well as link the client with appropriate college faculty or refer them to other local public and private experts. Much of the entrepreneurship instruction and consulting is conducted under the auspices of the Small Business Development Center (SBDC) program administered by the U.S. Small Business Administration. Through the SBDC program, local SBDC consortia are established among community colleges, universities, chambers of commerce, and/or other local economic development organizations.

What resources does it require? Unless you personally are able to provide consulting services to business people based on real experience, you had better arrange for the services of a consultant. This individual, paid

by the hour, should have weekly office hours and be able to deliver sound business advice. You may obtain the services of an SBA SCORE counselor who will serve for little compensation, or perhaps gather a network of business instructors and other business owners who will each work briefly for no compensation. "Creative resource leveraging" means that you can put together a small business assistance service that works even with few resource dollars. Seek help from bankers, attorneys, accountants, insurance representatives, the local chamber of commerce, and others.

LABOR-MANAGEMENT COUNCILS

What is it? Labor-management councils are small groups of labor union representatives, managers, and educators that are established and operated in order to enhance relations between labor and management, to build a climate of trust and information sharing, and to assist in creating a local reputation for a positive labor-management environment. This serves an immediate as well as long-term purpose. Improved relations between labor and management will help companies retain or increase their productivity, which helps keep the company in operation, increases the likelihood of its expansion, and thereby helps create and retain jobs. The success of labor-management councils, and sometimes the mere fact of their existence, in the long term improves the overall business climate, which aids the development or attraction of new companies to the area.

What resources are required? The success of this role depends not on resources but rather on the reputation of the college and senior college administrators. Both the president of the college and the economic development director must be viewed by both labor and management as fair, unbiased, committed, and willing to work for the council to succeed. This role should not be attempted until the college has established a strong and public reputation for service to industry and labor. A good deal of work in relationship building with all involved individuals must precede the beginning of the council: an agenda agreed upon and tentative goals identified even before the first meeting. Do this only after consulting with your president.

SERVING DISLOCATED WORKERS, THE CHRONICALLY UNEMPLOYED, AND UNEMPLOYED YOUTH AND SENIOR CITIZENS

What is it? This role involves managing projects and offices under the direction of the federally financed and controlled Job Training Partnership Act. JTPA provides states with millions of dollars annually to offer training for economically disadvantaged persons and dislocated workers and to conduct employment-generating activities to serve these populations. Many business centers house college JTPA activities or at least

coordinate their efforts with JTPA programs. Economic development efforts should be coordinated with efforts to train people for jobs, whether simply to ensure that the training is relevant to job opportunities or to place people in need of work in on-the-job training and at the same time meet companies' labor force needs. In some business centers, JTPA programs are administrative units along with units for other training and economic development activities.

These programs require recruiting unemployed or underemployed individuals, arranging for training (either by yourself or by contract to some other institution), and placing them in jobs. As expected, there is a great deal of bureaucracy and paperwork required and sets of expectations to be met. However, a good JTPA program is the best kind of economic development, because it directly assists people who need help.

What resources are required? If your office is awarded a JTPA contract, then most of the resources will be provided. You will be expected to work closely with the local JTPA Service Delivery Area (SDA) and the Private Industry Council (PIC), a group that manages most of the JTPA programs on the local level. You will have to hire and manage a staff that may pull you away from time required to play the other roles you have chosen.

COMMUNITY ECONOMIC DEVELOPMENT PARTNER

What is it? The role your college may be expected to play as it interacts and cooperates with other groups and agencies will vary with the size and scope of local economic development activity. At a minimum, the college must be prepared to provide education and training for new or existing local firms. Further, you should anticipate working with the staffs of other economic development organizations to present a coordinated and unified package of assistance to meet company needs.

As you might expect, there are numerous benefits to the cooperative approach. As other organizations begin to understand and accept the contributions the college makes, they will very likely assist in promoting your services—a valuable way to leverage your limited resources for advertising. In turn, you must understand how to represent their programs and services and be ready to trade client lists, offer names of key company personnel, and trade basic information. Frequent (monthly) meetings to review activities and trade war stories will be useful at the beginning, and then, perhaps, phone conversations may replace the meetings later.

These partners will be found in chambers of commerce, local town government community/development offices, the Private Industry Council, economic development commissions and corporations, state agencies (e.g., departments of commerce), and more. In several states these partners will offer you and your clients assistance in paying for training programs you will conduct, or will have specialists available to add consulting expertise to your proposal. Seek these folks during the formative state of

designing your office and ask them to serve on your advisory committee. Under no circumstances must you allow a competitive relationship to exist between you and any other local economic development service unit. Remember, the client, the local business person, is absolutely uninterested in who provides what he or she needs so long as it is delivered. Working in concert allows the team to bring much, much more to the table.

What resources are required? Few. You need to attend meetings cheerfully and regularly, and be interested in the projects of the other organizations. Be willing to share the credit and expect to share the work. These folks will become your friends and your support staff.

PARTNER WITH ORGANIZED LABOR

What is it? In 1983 the AFL-CIO Executive Council stated: "Putting America back to work will often depend on our ability to send America back to school. Education and training related to job opportunities should be easily and freely available. . . ." (*Collaboration: Vocational Education and the Private Sector*, p. 132). They were clear about the importance of training and reskilling this country's labor force as a prerequisite to economic recovery. If your institution, and most do, exists in an area where workers are organized, then seeking partnerships with unions is an alternative deserving serious consideration. It is true that many examples exist where local union training programs seem to compete with similar community college programs, but changing economic conditions are bringing the two together. It is also true that most of the training programs you will design and deliver will have been at the request of management, not labor, but the most successful retraining programs seem to be those that include union representation on the management-college team.

An education-training partnership with organized labor may exist in several forms. First, unions may negotiate with management an agreement whereby the company pays the tuition costs for workers to attend the regular programs offered at the college in order to begin retraining. Second, union leadership and management may jointly consult with your office on the design and delivery of in-plant education activities that will assist workers to meet the demands of new production systems. Third, you may be requested by the union to assist in the out-placement of dislocated workers, which may include assessment, training, job-seeking skills, and placement. Finally, you may be involved in a long-term, permanent relationship with unions, exemplified by the UAW-Ford Employee Development and Training Program operated at Henry Ford Community College in Dearborn, Michigan. This multipurpose program includes counseling, training, placement assistance, research, human development education, elementary and secondary education, and more. It is fiscally supported by the Ford Motor Company by agreement with the UAW. It is the best known example of community college involvement with organized labor.

What resources are required? Your institution must be able to deliver or broker the training/education services required. This may be facilitated by an agreement by the company (and supported by the union) to use the equipment and facilities at the plant and remove the obstacles of equipment attainment. If the college can meet the training needs, you will be required to negotiate a training agreement that will satisfy both union and management demands. Patience, integrity, communication skills, and flexibility are all that is necessary. Recently, a community college business assistance center in Illinois was able to bring all the parts together for a successful series of training activities involving machinists and management, and thereby saved 400 jobs that were to move to another state.

THE COLLEGE'S CONNECTION TO INDUSTRY

What is it? The faculty, staff, and student body can benefit from connections made through your office to the commercial world. For example, a very successful faculty development program requires instructors to spend a length of time in industry or be involved in some part of a local business. The contacts that your office makes with business will enable placement of faculty in appropriate settings where interaction with the real world will rekindle new interests and resharpen skills. Students, through a cooperative education program, may have the opportunity for work experience that will provide a suitable finish to the formal education they have experienced on campus. Co-op program managers have shown that students who have real work experience stand a higher chance of landing a job within their chosen fields. Naturally, the business service unit may identify placement opportunities for students and facilitate the arrangement necessary for the experience.

As two-year institutions turn increasingly toward the private sector for partnerships and assistance, the relationships built via the business service unit, along with a positive record of training and consulting, will certainly be useful. Business people seem to enjoy an association with a reputable college and welcome invitations for a role on advisory committees or a foundation. Senior college administrators will expect you to provide introductions to these business people.

What resources are required? This role as connector is more a result of your success than a set of activities you will need to pursue. The person-to-person relationships you build by producing for business what it needs will pay off to the college in a number of ways. Care must be exercised not to request help excessively.

TRAINING MATERIALS DEVELOPMENT

What is it? Since business centers are on the front line in providing training for business, they are in a position to develop and implement new

training programs. This, in effect, can serve as a testing ground for the development of new curricula, which is particularly relevant to local labor market needs. The opportunity to produce training manuals, quality-control plans, and other aids in the form of books and audiovisuals is a new role for many colleges. For example, Eastern Iowa Community Colleges, through the business center, has begun successfully producing training films.

What resources are required? As expected, this role is labor-intensive, requiring skilled writers, curriculum developers, filmmakers, and support staff. Unless the college has previously invested in equipment and space such as TV studios, this role won't be for all colleges. The primary requirement of business center staff will be to manage these projects, bringing together the specialists with business personnel to produce the project. It is very time-consuming.

LABOR MARKET INFORMATION CENTER

What is it? Reliable, valid, and timely data about local industry and labor trends is critically important to a college's program-planning efforts as well as to economic development initiatives. However, in many cases, such data is difficult to find. Most regularly gathered data sets are often 12 to 24 months old before they are published. Even when available they frequently do not provide much information at the county or municipal level where local industry, government, and educators can use it.

A limited number of college business centers are experimenting with models to gather data using the connections they have to the marketplace. Business centers can utilize existing labor market information, research their own local labor market information, and manipulate data to assist in economic development planning. The data can also be used beyond the business center itself. For example, the business center can provide it to other local economic development entities to assist in local economic development planning and activities. Most importantly, the center can provide the data to college occupational divisions to assist in planning and updating of occupational curricula.

What resources are required? A more than superficial understanding of how labor market information is gathered and manipulated by government agencies, and of the formats in which that data is published, is crucial. Center directors need to begin to gather available published data and organize it so that it can be referenced. Next, schemes for capturing information about the local area must be devised. A model for gathering local data might include creating an advisory committee of local labor experts (personnel directors, dislocated worker program directors, state unemployment office directors, etc.); cataloging the jobs offered in classified advertising; running periodic surveys of specific job types; and using the data gathered from college student surveys, program evaluations, and the place-

ment service. A useful activity, both from a pragmatic sense and a promotional sense, is to create a brief, monthly, labor data newsletter.

FEDERAL AND STATE CONTRACT PROCUREMENT ASSISTANCE

What is it? This role represents another somewhat new special type of activity for business centers. "Contract procurement assistance" means assisting businesses in bidding for government contracts. Since all levels of government purchase all types of goods and services, it is most likely that many businesses in your service area would qualify as vendors.

Selling to the government is a complex process and does require knowledge and understanding. Qualified business centers are discovering an intense interest from business for this special help, and because government business frequently translates into new jobs for companies that win contracts, it is proper for colleges to assist. The assistance can be provided basically as instruction that will enable companies to learn how to prepare and submit bids, or it can also involve direct assistance to business through the entire complex bidding process.

What resources are required? This service will require a trained specialist who devotes a high percentage of time to delivering information and to promoting the buying opportunities. A decision to begin this activity will require a commitment to staff and materials. A few colleges have initiated this service and have been able to reach a level of competence for which companies will pay, but only after one or two years of success.

TECHNOLOGY TRANSFER AGENCY

What is it? The phrase "technology transfer" is neither new nor unique to the programs of community colleges. A generally accepted definition is "the efficient and continuous transfer of technology from the inventor/academic community (holders and creators of knowledge) to the producer/business community (users of the knowledge)." What is clear by any definition of the phrase is that ideas and information are moved from holder to user, and it is in the concept of "moving" that community college business centers identify the role that they are uniquely positioned to play.

As the business center goes about delivering training and consulting services, it interacts with a number of information resources. These include the faculty, other businesses, consultants, other business organizations, and libraries. In a very real sense, the office has become a "touchstone" with many resources that may be needed by business. As an example, consider the power of the college's library. Using electronic means, any community college may access and search an almost unlimited number of other library collections and databases. The networks that currently

have access to special collections offer a vast and generally untapped source of information for a business with a unique problem. The technology transfer role suggests that the staff of the business center become the conduit through which needed information or access to information should flow.

What resources are required? Take the time to review, within the staff, what information sources you currently use. Analyze the potential for your library to access off-campus databases. Entertain a problem or two from one business, and plan how the information for solution might be gathered. In short, figure out what you have available as resources, open new ones, and then use them to attack a problem.

PARTNER WITH BUSINESS

What is it? The term "partnership" is often used to describe the relationship between the college and the businesses it serves as if both have entered into some type of formal or contractual agreement. While at times a contract will be used to define an association, mostly the partnership refers to the willingness of each institution to help the other. It is a personal as well as institutional link between the community college and the business based on a mutual belief that there is value to be had in maintaining the connection.

Most typically, in a partnership the college delivers education and training in a variety of ways; provides consultant assistance when able; sends candidates from the school to apply for positions; promotes the company in public arenas; makes the college facilities available to serve company needs; and stands ready to respond to most any reasonable and relevant request. The company requests training and consulting assistance of the college; provides payment for services in a variety of ways; provides personnel to advise the college on a wide range of topics; advocates on behalf of the college in civic and political affairs; sends and supports employees as students; and provides entrees for college personnel to other companies and organizations.

What resources are required? All business center and institutional services as available are required, depending upon the breadth of the partnership. Establishing and maintaining the partnership requires not only the personal involvement of the chief executive officers of the two organizations, but also the personal contact of the working staff who ultimately will make the partnership function on a day-to-day basis. It connotes that personnel within each institution will hold more than a superficial understanding of the inherent functions, procedures, protocol, processes, and problems of the other.

BROKER AND ASSISTANCE PACKAGER

What is it? The term "broker" or "brokerage service" refers to a set

of activities that requires bringing an individual or company with a problem together with an individual or group that can help solve the problem. Within this definition the following activities are implied: having knowledge of a wide variety of resource people; having routine access to companies and businesses to learn of problems; engendering confidence within the business so that help will be sought; assessing the problem and recognizing the type of remedy required; bringing the resource to the problem within the framework of a formal agreement protecting all parties; managing the relationship; assuring that agreements are fulfilled; assuring that quality is achieved and that the client is satisfied. Frequently, the resource will not be a faculty or staff member, so that even greater diligence will be required.

Closely related is the function of "packaging" assistance for a company. Occasionally, the business service office can bring several types of assistance, possibly from more than one source, to a company. For example, the College of Lake County works closely with Private Industry Council staff and with one or more of the state funding agencies to meet manpower and training needs. The college offers customized training and consulting for current and new employees. The PIC staff, through JTPA funding and programs, can offer both potential employees and financial assistance for employee training to the company. The Illinois Department of Commerce and Community Affairs, the Prairie State 2000 Authority, and the Illinois State Board of Education's High Impact Training System are the state agencies that provide financial assistance for training new employees or, in some cases, for upgrade training. By combining the efforts of several offices, an effective and attractive (especially to a company being attracted to your area) workforce training package can be offered.

What resources are required? Business center staff ought not *be* the resource, so that they are free to work on many problems simultaneously. However, the center staff must have routine access to companies and businesses to learn of problems, and have a knowledge of a wide variety of people to bring in to solve problems.

CONCLUSION

This chapter has presented information to assist you in understanding the business center concept, in identifying the mission, and in becoming familiar with the types of economic development activities from which you may choose. Remember our tip in the first chapter: to start small but think big, as though you were establishing a business. Be certain that what you choose is appropriate to your college's general mission. Most centers build upon the fact that they are primarily in an educational institution and start with customized job training for industry. Establishing that firmly as a base, they then expand into other areas of business assistance, such as entrepreneurship instruction and consulting services. Only when the

college has fixed its credibility as provider of quality instruction for business should it consider venturing into other areas. Business center growth should be a logical progression from instruction to service, built upon a solid base and with local cooperation. Let the college be seen as becoming involved in areas outside its mission.

Do not expect the initial form of the business center to be clear and discrete, as it should evolve and change with time. To create an office with an evolving set of goals and objectives initially and to deliver partially defined sets of activities may cause some anxiety for board members and senior administrators, but they will have to live with that anxiety while the center starts to operate. Board members, like the center staff, should be encouraged to think of the new office as a new small business: to make the needed investment, start on a small scale on a sound, market-driven basis, give it good management, help it become firmly established, and allow it to grow.

IV

DETERMINING STATE AND LOCAL SUPPORT

From the preceding chapter, you have the basic information you need to define your business center. Before you proceed with establishing the business center, however, you will need to determine if you have adequate state and local support for this endeavor to be successful.

The role your center will play, and ultimately the success of any economic development program, depends on commitment, which must be evident in a variety of forms and at different levels. For maximum effectiveness, this commitment must be present at the state as well as the local level.

STATE COMMITMENT

If you anticipate being part of a statewide effort in which every community college will operate a business center, state support as well as local support is crucial. Ideally, state-level commitment should include support from the community college board, state legislature, and the governor. It should be clear among all these parties what the role is of community colleges in economic development and why their involvement is a necessary component of the state's economic development effort.

This state-level commitment will be necessary in order to obtain state funding for the business centers. The commitment will also be necessary in order to create a mandate for the involvement of community colleges in economic development; if the entire community college system is to be involved, the colleges will have to see it as a mandate from the highest levels. Further, if the college system is to be accepted into the economic development realm by other key players, such as the state economic development agency, the state and local chambers of commerce, and a host of other local economic development organizations, the colleges will need the state mandate to justify their new ventures, to pave the way with these existing groups.

So, not only will state commitment manifest itself in terms of funding and a mandate to all the colleges, but will also serve as an introduction to the other players, making them more likely to welcome you. The governor and the college board should take advantage of this by calling meetings between the college board and presidents and the top administrators of the state's economic development agency and state chamber of commerce.

LOCAL COMMITMENT

Of course, state commitment or a state-level mandate to the college system cannot alone yield a statewide business center effort. Also, if you are simply planning to initiate a business center at your college in the absence of any statewide effort, state commitment would still be helpful, but local support is more important. Of course, the ideal is to have a statewide effort based on both state and local commitment, but that is beyond your ability to control.

The local commitment is critical, as it is ultimately up to the local college to establish and operate the business centers. Local support means that the college president and locally elected board are fully behind the concept and will allocate resources to enable the business center to start and operate. To gain acceptance in the community, the president and board will need to make a public statement indicating the degree of importance that economic development activities will have for the college and the community. This public commitment should be well publicized within both the community and the institution. Hopefully, it will be the focus of comments from the college's chief executive officer and find its way into the agendas of the college's governing bodies.

To build upon a previous point, the statement of commitment must clearly demonstrate that the college's decision to enter the world of business service and economic development is a significant new direction for the college, not just another add-on program, but a real commitment. If the board does not make a commitment, it will be exceedingly difficult to proceed, although you might influence them by illustrating activities and successes of other community colleges and highlighting their impacts, as well as by showing the potential to serve your own community. An example of a board of trustees "Resolution on Economic Development" is found in appendix I.

STATE AND LOCAL COMMITMENT: THE ILLINOIS EXAMPLE

The following example illustrates how state and local commitment can combine to form the ideal combination to initiate a statewide business center effort.

In Illinois, Governor James R. Thompson called a meeting of all public community college presidents to request their assistance in moving the state into a new era of productivity and prosperity. Jointly, they developed a list of activities in which community colleges should be involved, ranging from providing customized job training to assisting in business recruitment and retention efforts. Thus, a mandate was established at the state level.

Concurrently, the executive director of the Illinois Community College Board had been pursuing his vision of community college involvement in economic development, encouraging the college presidents to examine their missions and determine how economic development could

appropriately be incorporated in their respective districts. Further, he established a full-time economic development liaison position at the board to assist community colleges in their local economic development efforts and to coordinate activities with other agencies, particularly the state economic development agency.

At the time this commitment was occurring at the state level in Illinois, equally if not more important were the efforts moving forward at the local level, all merging to produce the overall effort. At the time, a number of community colleges had been operating successful business centers for several years in recognition of the necessity for their services in business development and in response to local needs. These centers served as the local grassroots impetus for community colleges statewide to become more involved in economic development. These community colleges effectively served as indigenous leaders, models, and teachers to bring other community colleges into the economic development picture. The local effort also helped move the state commitment forward, by proving that local commitment existed.

Between this local and state commitment, the community college system was becoming increasingly involved in economic development; however, without a statewide funding basis, efforts were sporadic from one area of the state to another. In 1983, to solidify the state and local commitment, the state appropriated $2.5 million in the form of economic development grants to the community college system to enable each district to establish and operate a business center or economic development office. Since Illinois has a decentralized system, with coordination and basic regulation provided at the state level by the Illinois Community College Board, the economic development grant program was designed to allow for maximum local control to respond to local needs, in keeping with general Illinois Community College Board rules.

CONCLUSION

The Illinois initiative illustrates that commitment at both the state and local level is important to a statewide community college economic development effort. It also shows that the state commitment can be spurred by a showing of local commitment and local initiatives, and vice versa. It is not nearly so important who starts the initiative as it is that the state and local levels both become committed to the effort.

While Illinois' effort seems to have been successful because it had both state and local commitment, another important factor was that the economic development grant program was designed to complement the state's decentralized community college system by affording the local community colleges a great deal of local control and discretion to conduct economic development activities as appropriate to their districts. Likewise, states that have more of a state-directed system will need an initiative structured jointly by the college board and local colleges reflective of that state's mode of operating.

V

IDENTIFYING NEEDS AND RESOURCES

In order to firm up your business center concept and establish the office, you will need to do some legwork and gather background information, including identifying local needs that can be met by the business center and identifying resources that the college can use to fill these needs in conjunction with the other resources the community may bring to bear on its economic problems. Remember that although you will establish the business center to be market-driven in order to respond to identified needs, you can expect the character of the office to be somewhat fuzzy for the first year as you establish yourself in key activities such as customized training, and begin to expand into other areas. Further, your mission and activities will not become entirely clear until you and your staff are interacting directly with businesses and the myriad of problems they face. Only when you call on industry, walk the factory floors, sit in union halls, join in complex projects with other economic development partners, and communicate directly with workers who have been hurt by local economic conditions, will you be able to fashion the proper office for your community and your college.

Advisory committees and the prior experiences of your sister colleges, along with books such as this one, will ultimately help you design the office in its startup phase. Initially, we recommend the use of two separate committees: an internal committee consisting of useful college personnel, and an external committee consisting of business and other economic development personnel.

THE EXTERNAL COMMITTEE

The external committee, with its business and government economic development membership, will help address your mission as it relates to business needs and existing resources in the community. It will help make your center market-driven and begin the process of discovering your niche in the community.

This external committee should be organized immediately after the college publicly announces its commitment to business service. Members of the external committee should include one or two small business owners/operators, two or three managers from local manufacturing (e.g., a personnel director, a training manager, and two persons who are directly involved in industrial production), one or two representatives from service industries (e.g., a bank officer, a restaurateur, and the manager of a temporary services office), the head of a local chamber of commerce, a local government official, and a representative of one of the local economic development organizations. Seek individuals who have an active interest

in economic development and business service activities, and who will actively work on your behalf. Of course, any person who potentially can assist in making other business connections will be helpful on your committee.

This group should focus on two broad areas: determining potential service roles to the business community and building connections to businesses: in other words, role analysis and marketing. There are survey instruments available for use if your committee chooses to gather information from a large number of businesses, and that may be a useful first step. However, one-on-one calls made to business people will both generate valid information and begin a relationship for further contact. Committee members probably will not be able to afford the time to make calls, so that role will fall to college business center staff. Use your committee to arrange introductions to key business people, thus simplifying and expediting your outreach program.

Using the contacts and resources of this committee, conduct research using a combination of first-source data (you gather it directly) and second-source data (information gathered by other groups and organizations that may be useful to you). This information may be obtained from local economic development agencies, local and state chambers of commerce, state employment agencies, Private Industry Councils, and state labor bureau agencies. Meet with individuals from other groups that serve the needs of the commercial and industrial world to discover the requirements that they have identified. Seek also, from these groups, opinions about the roles that the college might play as a partner and detailed information about their local development activities and resources.

Most business service units begin with roles that include customized training and workshops or seminars. As you question business leaders, focus on these two roles to assess possibilities for specific types of offerings.

A planning and problem-solving approach would normally dictate that all needs and problems be identified as a prior step to identifying resources. This will hold true to an extent; however, as you have noticed, some of your sources to identify needs and problems will also be entities that bring resources to bear on business assistance and economic development. Also, it is of paramount importance that you consider the role of other organizations in serving the needs of commerce and industry. Consequently, you will find yourself working with these same entities to identify needs or problems and resources, and you will need to decide at which point you make contact with the other local economic development players.

Some colleges do all the need/problem/resource identification on their own before contacting the other local players. The advantage of this approach is that you will be more knowledgeable when you first communicate with them and will be better able to use the tips and information they offer. The disadvantage is that some of the information you need might already be available from these partners. Also, you could give the

impression that you are being too independent, with the possibility that the other organizations will resist joining with you later as they may feel threatened.

Other colleges do little or no needs analyses on their own. Other players are contacted at the beginning to get their perspectives and to learn what activities they are conducting (and what resources they have available), and to help identify where the college might appropriately fit into the picture. The advantage of this choice is that you avoid duplicating their completed efforts in needs analysis and can more quickly identify your niche in the market. The disadvantage is that you approach them before you have a more fully developed concept of your office. The result could be that they question your credibility or that you find yourself subverted to what may be their limited view of your appropriate role.

We recommend finding a desirable medium between these two options that best fits your developing situation. It is a matter of local preference based on your savvy and awareness of your local environment. Your goal is to find "friends" who will work with you, and businesses who can provide you the first opportunities for conducting services.

THE INTERNAL COMMITTEE

Now that you have begun working with your external committee to identify the needs that your business office should accommodate and some of the outside resources needed, you will now begin to look in-house for the remainder of your support and resources. Your search will include looking at personnel, identifying programs and curricula that would apply to on-site training needs, and discovering equipment and training laboratories that can be of use, with the assistance of an internal committee.

For the internal committee seek faculty and staff who will necessarily and tangentially be involved in the operation of your new office. Include faculty members and administrators from the technologies and business divisions, the directors of public relations and financial offices, an officer from the college senate, and one or two individuals who you know support you and the concept of business service. Three major tasks should be addressed by the internal committee. First, determine what resources will be necessary. Second, raise awareness within the college of the need and purpose of a business center. Third, determine which needed resources the college possesses.

Regarding what resources will be required, the easily identified needs include office space, center personnel (dependent upon the size and number of roles chosen), and equipment. We will cover office organization in more detail in future chapters and specify the minimums for opening the office. Suffice it to say that capital equipment must be procured and placed in a reasonable location.

Regarding awareness raising, you and your committee will need to inform college personnel, through both routine and special communications, about the purpose and focus of the new office. It is critical that college staff and faculty hold favorable perceptions and attitudes about this new office and its plan. It may require a long-term and persistent effort to bring people along and help them to achieve a good attitude. Probably the single most powerful action you can take is to recruit and contract with a faculty member to deliver a successful program for a business. These "partners" will become your advocates. Be sure to publicize the event and include comments from the satisfied customer. Another vehicle is the use of a regularly produced bulletin mailed to the homes of the faculty and staff. Make friends, retreat from areas that are producing resistance, and publicize your victories.

The more difficult task is to discover the (possibly latent) abilities of faculty and staff that might be used in the business world. Initially, you need only to identify the subject areas in which your college has the capacity to provide training. You might want to do a more thorough job of identifying specific faculty expertise. This is addressed in chapter 6 regarding finding resources within the college. Following a period of awareness raising within the college, members of your committee will need to begin a series of personal interviews with all individuals who have been identified as having potential.

The task of determining how the office will fit into the existing support system will require communication between your committee and the service components of the college. The business office will support the possibly new process of contract management and billing; the public relations department will be confronted with the sizable job of supporting the promotional needs you will have; the library will be serving clients whose data needs will likely require access to new collections; your space requirements for short-term training and one-day conferences will need to be integrated in the college's space allocation system; and the list goes on. As you consider the roles you might play, the need for resources and support will be obvious. During the life of this internal committee use these individuals to help smooth the way toward the acceptance of your office with the college.

You will be pleased to discover that the college will have a number of faculty and administrators familiar with the commercial and industrial world who can participate in your planning sessions. Take advantage of staff competence; it provides you with an important foundation to build upon. Do not assume that your existing staff will necessarily have all the needed expertise to establish an economic development mission, or you may find that your "new" initiative is just conducting business in a manner already established. Be prepared to hire a qualified business center director from outside the college if necessary, so that the new office is led by an individual who sees clearly the differences between old programs

and new market-driven activities. Chapter 6 provides additional information regarding staffing the business office.

This point in the development of your office is an appropriate time to begin to identify the financial resources needed to operate the office. This process is a test of the commitment of the college to opening an economic development office; progressing much further without assured financing would be a waste.

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SECTION II

ESTABLISHING THE BUSINESS CENTER

VI

STAFFING THE OFFICE

Earlier chapters have underscored your need to interact with as many interested and useful people as possible, because they will provide help, advice, and support. As you design your office functions, the next few steps, however, are going to be more easily accomplished alone. Eventually, you will be left with much advice and information about the roles your office will play, and you must select one or two and base your initial planning on them. And, before beginning your outreach program, you must attract and establish a resource base, design an image, hire and train a staff, and organize your office.

Staffing the office will involve hiring a center director and office personnel to handle the day-to-day routine functions of the office. In effect, the business center staff are the core of the office and will directly affect the degree of success the office will experience. The initial staff will probably include a director and his or her secretary, with others being added as business increases. Some colleges have begun with a larger staff, knowing that they will generate enough business for the college to more than cover the salaries and related costs after a short period of time. In any event, the initial few months, and even as long as two years, may find the bottom line of the office's expenses to be in the red.

This next chapter will walk you through the staffing process, offering a few suggestions, with the understanding that the choices you make will fit your style, your budget, and secure your president's approval.

THE CENTER DIRECTOR

The selection of a center director with appropriate experience and skills is critical to the successful operation of the center. It should be given all due attention, regarding not only education and background experience, but also specific skills. Whether you will be the business center director or will be hiring the director, attention should be paid to finding or developing the appropriate expertise.

Regarding background, directors tend to fall into one of three fairly broad categories by virtue of their background in the commercial/industrial world, as a community college administrator or faculty member, or as an economic development and/or job training professional. Ideally, the center director will have a background in all three of these broad categories, but finding the ideal will be difficult. A solid background in one of these areas, paired with experience in another, is more likely. In any event, search for an individual who learns *quickly* and is able to manage well in an unfamiliar environment.

There does not appear to be a trend in either experience or education, nor does there appear to be a source from which directors come. Certainly, having worked in industry will provide you with an understanding of the role of human resource development and how a workforce is managed, but, on the other hand, if you are an educator, you will more easily master the politics and operations of program and project management in a college. Perhaps, rather than identify a preferred background, it would be more useful to review some skill areas that will make a winner.

Communication

Certainly the most necessary skill is the ability to transfer information to people in a clear and logical manner (oral and written), and to be capable of changing the attitudes of those upon whom you depend. You will be required to explain what it is you do, both to clients and to college personnel, and convince them to work with your office or provide your resources. In fact, the director must be skilled in all aspects of communication, including:

- Interpersonal communication skills, to work smoothly with office and college staff, clients, and other economic development office staff;
- Telephone skills, whether contacting businesses or dealing with other college offices. Obviously, the more work accomplished over the phone, the more time there will be for other projects;
- Writing skills, particularly important to write grant proposals, training/service proposals and contracts for businesses, and promotional literature, as well as letters; and
- Public speaking skills, to publicize your mission before a wide variety of groups, often using a "canned" but modifiable speech that is ready at all times and can be adjusted to specific audiences.

Administration and Project Management

The business center director must have a variety of managerial skills. As the operations officer for this new venture, you will be involved in a number of projects simultaneously. Even at this point, without any client projects, you are responsible for staff management, sales, marketing and promotion, fiscal management, internal relations, and other duties that may slide down from your president's office. "Project management" means that you must direct attention, regularly, to all your tasks, and also have an accurate perception of the *larger* picture; that is, are we meeting the expectations of our mission and do we fit into and support the institution?

The ability to instill structure and routine into your operations is the basic requirement. This may be accomplished in any number of ways:

maintaining lists of activities; designing a file system that brings things to your attention in a timely manner; or installing a computer time-management program. However, none of the above will replace a skilled and alert secretary. Along with attention to tasks is needed the ability to prioritize, schedule, and know the capabilities of your staff when making delivery promises to a client.

At the heart of project management is the ability to analyze projects and the environments in which they are to occur, and comprehend fast-developing situations in relation to both the project and the office mission generally. Included are the ability to define accurately the real issues impacting a project; evaluate the risks; do cost-benefit analysis; choose the best alternative within acceptable risk limits; and design a plan. Often this must be accomplished within a brief time frame and without full information. The bottom line is that the director must have the ability to administer the office and show visible results in implementing the office's mission.

Team Player

The team-building and team-playing skills are most necessary for long-term success. They require the ability to delegate tasks and responsibilities, and to trust that they will be accomplished. Trust and displays of confidence in the people who report to the director are the *only* avenues toward building a group that will perform. It is possible in the short term for the director to direct the team activities, to be the center of all the projects, but that will most likely lead to a lack of team ownership in the office's mission and an overdependence upon the director. The goal is to create an atmosphere of entrepreneurship. Another side of team playing is for the director to be part of the college management system and be perceived as concerned for issues larger than only those of the business center.

Entrepreneurial Opportunist

The successes of the director will depend heavily upon the ability of the staff to take advantage of opportunities for delivering service or training. Initially, and often as a new office, the director may need to practically force those openings to occur. In a confident and assertive manner the director may choose to propose to the first few companies that the staff need a project to demonstrate their capabilities, and offer to do it for little or no cost. If you are confident that you have the resources to handle the job, then convey that confidence to the company. Early successes may be used as references for later jobs. More influential than any other single factor is the director's ability to make a prospective client feel your confidence in the center's ability.

Another element of opportunism is for the director to be able to recognize timely opportunities as he or she scans the environment. This is best described by an example that has occurred with several colleges. The health care industry, primarily hospitals, has been experiencing a traumatic set of changes as funding sources have diminished. Many hospital training departments have been dramatically reduced in size, and some health care institutions have begun to market training and other services to the public as a profit-seeking venture. Terrific opportunities became apparent for the colleges that could deliver health care training, either as a replacement for the defunct training departments or as partners with these new training "competitors." Statistical process control is another hot new opportunity. The point is to be able to recognize a role for your college and its training and consulting abilities whenever change is occurring in your environment. Seek and ye shall find!

Winning Characteristics

Other winning skills or characteristics are flexibility, cooperativeness, professional appearance, creativity, drive, focus, a can-do attitude, and a sense of humor. Frankly, we have yet to meet a business center director with all these abilities or skills, but the good ones seem to have most of them.

Flexibility is of utmost importance, not only because the center director must have a wide range of skills for varied responsibilities, but also because he or she must be able to see the business center functions as distinctly different from other college functions or their previous responsibilities. As noted in chapter 2, the business center contrasts markedly with the scholarly and relatively slow-moving decision-making and implementation process generally evident in education. As the director will often need immediate service from other college offices, their ability to be cooperative and enlist cooperation of others also comes into play.

All this must be rolled into a can-do attitude, so that businesses are confident that the center can deliver and so that the perception becomes reality.

THE OFFICE STAFF

Few words of advice are offered here, except that the clerks and secretaries who work in this office must be comfortable with a lack of routine and be able to handle workloads of varying amounts. All office personnel are expected to have adequate secretarial skills and strong communication and human relations talents. Also, your office staff will probably double as your conference-host staff, so the hosting activities such as greeting, registering, and organizing refreshments and lunches should also be fun and manageable. Consider attracting a secretary who has

experience with the college system and understands its mores and peculiarities, so as to integrate the office more quickly into the institution.

Of course, the better the secretarial staff, the better the center can function. In addition to the base skills presented above, consider seeking a secretary with skills or clear potential to function as an administrative assistant: someone who can assume some of the director's responsibilities for scheduling and organizing conferences and meetings, who can help with computerized office systems, and who can generally be a solid support staff, to see that what needs to be accomplished is accomplished.

THE RESOURCE PEOPLE

The choosing of individuals upon whom you will depend for the delivery of on-site, custom-designed consulting and training is the most critical factor of your preparation. They, like yourself, will represent your office and the college to businesses, and their behaviors will directly impact the perceptions businesses will hold. These individuals will spend much of their "company" time working without you, and if things are not going well, you may not know it until later, nor will you fully understand what occurred. Therefore, choose these people carefully and prepare them to the degree that they comprehend their importance for your office.

The search for resource people will vary significantly from the search for a business center director and office staff. First, you will be looking at in-house faculty with appropriate expertise as well as outside resources with whom you may need to contract for services. Second, while there are many skills and subject backgrounds that you will need to list and find, you will also need to inventory the expertise within your institution and perhaps neighboring institutions to have a resource bank of people, should they become needed. Therefore, in addition to covering desired backgrounds and skills, the following also provides extra information on sources and strategies to identify your resource people.

Expertise and Skills

Regarding skills, you will need to identify the major areas in which you expect to provide training or consulting, so that you can identify resource people to match those needs. Then seek individuals with appropriate expertise, whether faculty within the institution or outside resources. This expertise will include:

- Thorough knowledge of the subject area, whether as a teacher or person within industry, and the ability to apply that knowledge to real industrial situations;
- The ability to assess and analyze real in-plant situations, whether human resource or technical resource in nature, and prescribe solutions;

- The ability to complete projects with reasonable speed and within agreed deadlines;
- The ability to design and produce instructional units or delivery systems for on-site instruction;
- Project management experience;
- The ability to work on-site at a business, including relating to company management and labor, working with adult employees as compared to younger college students, and fitting-in in terms of personality (experience in industry is desirable, but solid ability will suffice while your resource people gain this experience);
- An understanding that the business receiving the training will rightfully expect to influence the content, the choice of instructor, the delivery method, and the place and time of the activity (instructors must not expect the academic freedom under which they function in the classroom, but instead expect significant business influence);
- The willingness to dress for the part and wear conservative business suits when calling upon company management and to wear more appropriate work clothes when on the plant floor (the impression made by the resource staff's appearance is as important as their abilities in being accepted by business, so the importance of dressing right must not be discounted);
- The ability to handle largely unstructured situations, greatly different from the traditional classroom; and
- The ability to work as a team player rather than as a dominant personality.

Finding Resources within the College

The task to discover the (possibly latent) abilities of faculty and staff that may be used in the business world will be both time-consuming and difficult. First, a period of awareness raising within the college needs to occur, and should include descriptions of the mission of the new office and some words about the very positive possibilities that may materialize for *qualified* faculty (very early in your promotional activities a tactfully delivered message must lead to the understanding that you will select eligible people). Do this by using the college's internal news organ (bulletin, newspaper, etc.), by holding several timely awareness meetings, and by announcements at faculty meetings and social occasions. Then, follow up the awareness campaign with a paper survey inquiring about the interest each faculty and staff member may have in *investigating* commercial and industrial work. The key points in all this are:

- You are not asking for a commitment from faculty until they have a full understanding of what is going to happen.
- Don't ask bluntly whether an individual wants to participate, since many will say no before they know what will happen.

- The information you need is really limited to a couple of areas; seek the areas of expertise according to what business experience has occurred.
- You will meet with each respondent individually to discuss your project.

Add to the survey data that you gather from participating faculty the names of people who did not respond but who you believe may have talents and experiences that you need. Do not assume that a person who failed to return your survey instrument is not interested, since there are hundreds of reasons why surveys are not completed. Once the data is in, you should compile a list of all individuals who will be interviewed.

Interviewing

Select a few members of your internal committee who will assist in conducting the personal interviews with all individuals who have been identified as having potential. Consider using only a few interviewers, and choose associates who are both well known and respected in the college. Probably, your best choices will be division chairpersons and deans, since they usually have considerable contact with large numbers of college staff.

Prior to beginning the interviews, organize a training session to review how you want the interviews conducted and what information should be gathered. Things to consider for the conducting of the interviews:

- Interviews are information-sharing sessions, *not* hard-sell recruiting meetings.
- Meet in the comfortable surroundings of the interviewee's office.
- Rather than conduct the meeting in a have-you-got-a-minute? format, set an appointment for the meeting, since you want the impression left that this meeting is of real value.
- Have each interviewer deliver a "canned" introduction (that you have prepared) during the first few minutes of the interview that contains most of the information you want business people to know.
- Prepare a brief written executive summary of this "canned" information, which the interviewer will leave at the completion of the interview.
- Be sure that each person interviewed knows what will be happening next and when he or she may hear from you again.

The information elicited will include a description of faculty expertise and experience and interest in outside contracting. During the interview questions should be quite specific as to exactly what the individual might be able to do in business. For example, rather than accepting "I can teach sales," your office needs to know more specifically if the sales training ability is for commercial or retail, point-of-contact, service or

product, management or sales calling, planning of sales strategy, etc., and has the individual had real sales experience. This process must be exhaustive and thorough. During the interview disregard faculty comments concerning hesitancy to interact with businesses (possibly lack of confidence?), which is a problem that can be dealt with at a later time. Your goal is to compile a resource file (ideally on a microcomputer) that reflects *all* of the college's current business service ability, since these resources will become the "product" you have to offer.

As for the information you want to leave with your potential resource people:

- This is a new, yet untried college venture that will be moving forward cautiously.
- This venture will depend heavily upon the talents and expertise of faculty and staff.
- The structure for finding business training and consulting opportunities will be a sales-type operation that will not require faculty to make initial sales calls.
- You or your staff will generally always accompany faculty on calls to industry, and that you will manage the problems that might occur.
- Review the not inconsiderable benefits that accrue with contract and consulting work: additional financial resources; opportunity to build confidence in off-campus educational delivery; renewal; a chance to work on advanced equipment in unique settings; and fun.
- Provide a brief explanation of how the process of assessing, designing, and delivering industrial services will probably be conducted.

Outside or Nonfaculty Resource People

As your office becomes busier and the needs from business become more varied, you will want to seek training and consulting assistance from people outside the college's faculty and staff. Good outsiders will augment your capabilities and allow you to meet more needs; however, they represent some risks that generally are not found with faculty. Locating outside resource people is not difficult, but obtaining the services of good ones may present problems.

The most attractive supplier may be from the ranks of the part-time or adjunct faculty employed by your college. Department chairpersons can identify the better instructors and will also know something of their quality. Since these part-timers frequently work full-time in the business world, some offer the advantage of understanding what you will expect of them and how to intersect with company personnel. A follow-up alternative is to establish a referral relationship with the administrators of other local higher education institutions. You probably have already identified a problem with this supply: since many of these instructors are already

working two jobs, they may not have the time for another, or they may not be available when you need them.

Another useful source is to attract employees working at a firm with which you are doing business. Once you have established a good relationship with an individual who has some skill to offer, just ask if he or she would be interested in an occasional consulting job with another company. Make it clear that you are very sensitive to not compromising the relationship you have with the current firm, nor would you offer an opportunity that might be with a competitor. When your inquiry is couched in terms of "one business helping another," or in "networking," or even of a large corporation aiding a small business, it may appeal to both the person and his or her company. The advantage to you is obtaining the services of an experienced business person. A similar strategy for locating talent with specific credentials when needed to train employees on company equipment is to contact the manufacturer of that equipment. The company may turn down your inquiry because it also contracts for training, but it may agree to help or refer you to someone in your area.

Other strategies for finding outside help are not very creative, but they work: place an ad in the help-wanted pages of the local newspaper; call your local chamber of commerce executive; and check the phone directory under "consultants." These last suggestions produce the greatest risk, since you will know very little about the individuals who respond. What are the risks?

The Risks of Employing Outsiders

Employing people who are not members of your college staff will place you in the position of sending representatives into industry who may be less concerned with the image and reputation of the college and more concerned with themselves. Hence it is possible that you may need to spend more time at the site to ensure that a full, high-quality job is delivered. Another unfortunate situation we have encountered is that, upon completion of the contract, the consultant will attempt to recontract directly with the company and bypass your office. Other situations will merit your attention: a consultant may overcommit himself or herself and be unable to meet time expectations; consultants will unlikely be able to speak on behalf of other college services or explain programs; consultants may not use all the support services available at the college for lack of knowledge; and consultants may be employed at a number of different firms, enhancing the danger of conflict-of-interest between companies.

Most of the outside resource people we have experienced have not been risks to the college and have been assets to the program. The rest of the risks are manageable. A good strategy is both to hold an in-depth interview with the potential consultant and to request and check references. During the interview explain in detail your expectations of the

consultant-college relationship. The critical point upon which you need agreement is that you and your office are the project managers and, with company personnel, will make the decisions concerning the conducting of the training. Also explain your expectation that he or she as consultant will not offer services to the company except through your office for at least a year beyond the completion of the current contract. You may want to draft an agreement that the consultant will sign formalizing your expectations. Certainly a good tactic is to make the consultant feel that you are including him or her on your team and are pleased that he or she has decided to work with you. Another tactic is to use fewer consultants but use them more, so that they feel that maintaining a good relationship with you will be a benefit over time.

For all this caution being expressed, it appears that you will have much to be concerned with when you go outside campus staff. Not so, but while most consultants perform exemplary work, one unfortunate experience may queer your relationship with a valuable client; so caution is the rule.

Tips on Staffing and Excellence

For you and your staff "excellence" should not be a concept that you strive for and only occasionally attain. It means for us, and we hope for you, a level of performance that is routinely reached. Perhaps it can be defined as a two-step process: first comes a vision or a perception of a level of conduct and execution that you and others would agree is exemplary; once the goal is identified, then procedures, processes, and mechanisms ought to be designed that systematically and routinely actuate the vision. The expectations of both staff and clients are for performances that are habitually excellent. It is what the client perceives and what the client receives during the delivery of services that assesses your particular excellence. You may not always have your act together every time, but that is a secret you cover with cool, professional, and consistent behavior.

A useful procedure conducted during the discussion and negotiation stage with the client is to follow step one above, that is, together describe what an excellent performance would be. Again, excellence is not a 100-yard dash, won by a burst near the end of a project; it is a marathon you never stop running.

VII

BUSINESS CENTER FACILITIES AND OPERATING SYSTEMS

As you design and construct your office, two principal tasks must be accomplished: building and managing a group of people who will not spend much time in your office but who will bear the heavy responsibility of delivering service; and organizing an office that will routinely ensure that projects are properly monitored and managed.

To establish your office you will need office space, equipment, and operating systems to conduct the chosen activities of the center effectively. Preparing your unit to conduct in-plant training and the seminar/workshop business is the vehicle we are choosing to assist you in organizing, as it is the recommended starting point for the center. A system that supports these functions will naturally extend to support the additional roles you choose, and we need to begin somewhere. The next steps will deserve a good deal of time and attention, since you are constructing the foundation of your venture; so move carefully, seek and use advice from colleagues within the college, and begin to contact other colleges that are in the business. Most of the challenges you will experience have been encountered by others.

The first two, the customized in-plant training and the seminar/workshop roles, are almost universally found in every office. This seems to have occurred not by accident or because they are most easily played, but probably because they are natural extensions of what colleges do: train and educate. They are also roles that industry needs two-year institutions to fill. A list of types of in-plant training and consulting programs is included in appendix II to suggest the wide variety of help that might be offered. Additionally, a strong reputation in customized training programs will lead to the evolution of some other roles, and you will grow into a fully operating economic development operation. Another advantage of choosing these two roles is that they will require your early and direct interaction with business.

THE OFFICE SITE

Insist on a place of your own where business people may be entertained without interruption and with reasonable ambience. Seek a place that may be easily located by outsiders and separated enough from the student environment to have a serious business "feeling." One goal is to establish yourself within the college community as a new, important, and separate venture, which implies a discrete space; so avoid being added to a larger office where you may be indistinguishable from other functions.

Occupy a space, if available, that has a general open area for secretaries, a waiting/reading area for clients, and private offices for each of your professional staff. If your staff includes just you and a secretary, then a two-room complex will be adequate until you begin to grow. Give some thought to storage space, since you will be producing printed material (brochures, program descriptions, etc.) and storing records. Obtain signs that identify your area and decorate the rooms so that they reflect the business image you are building.

Most centers are located on campus in a desirable location, often in an administrative building or near the president's office. Alternatively, you might consider a location more familiar to businesses, such as in a downtown area, perhaps in the same building or space as other local economic development entities, such as chambers of commerce. However, business centers generally start on campus and develop an identity and solid reputation before considering off-campus sites.

OFFICE EQUIPMENT

We are not going to cover the obvious; so obtain the furniture and equipment like desks, typewriters, and file cabinets. However, a few comments about some special equipment:

- *Microcomputers*. You are familiar with their functions: word processing, data management (file/recordkeeping), spreadsheet (accounting), and others. Open your office with the computer as an integral part of operations, especially for preparing contracts and proposals where much of the data is repeated, and for maintaining client data.
- *Peripheral computer equipment*. Primarily, this equipment includes both a dot-matrix printer (for labels and fast-print projects) and a letter-quality printer for correspondence, along with the necessary cables and a black box that allows you to use both printers off one computer.
- *Software*. Choose software that is compatible with what the other offices in the college use, especially for word processing. One of the two basic software packages you need to use is a data management system, which will help design electronic files and give you the ability to find and manipulate the data you gather about businesses and projects. Choose a data management package that is both easy to master and adequate for the tasks you will tackle. The second software needed is a word processing system for assistance with the writing chores. Before all purchases, get advice from the computer experts in your institution.
- *Labeling machine*. This machine, for about $2,500, will affix labels to the brochures and flyers you send to promote conferences,

workshops, and other college events. As your mailing lists grow, this task when done by hand is onerous. The labels, printed from your computer, can be easily applied in about a tenth of the time.

- *Telephones and answering machines*. Try to arrange for a phone system that will permit independent operation from the college's main system, which is often overloaded with calls at times like registration. Be sure that the calls ring at your secretary's desk and that calls may easily and reliably be transferred. Finally, if your office may occasionally be closed because of vacation or holidays that differ from the normal business holidays, then install an answering machine. True, most people do not care to deal with one when they call, but it is the best and most affordable technology available to handle the situation.

Once the space is identified and filled with the equipment, you can begin to install the systems necessary to operate. The first such task may be to develop a system to manage the vast amounts of information that will be necessary.

OPERATING SYSTEMS

Very shortly, you will be in managers' offices and on plant floors, where your real education can occur. The next set of activities to be accomplished is to define and create the operating systems within your office that will provide for the routine delivery of services. These new systems should readily follow the work you should be accomplishing with your two committees (internal college committee and external business committee). Think of each system as a set of procedures with supporting documents and communication links that, when followed, ensure that details are not missed and projects are fully managed through completion. The remainder of the chapter will assist you to create these processes.

About Systems

"System: a group of interacting, interrelated, or interdependent elements forming a complex whole" (*American Heritage Dictionary*). The "complex whole" is your functioning office, a person, or group, who understands and operates many individual processes and procedures and blends them so that the service needs of commerce and industry are routinely met in full. Some of the systems you will use in your office will be covered in this chapter and others will be covered in detail in the following chapters. At this point, however, you need to establish an overview of all the parts and an understanding of how each relates to the whole.

Each part of the larger system has a specific and clearly defined set of objectives and, to a degree, operates independently. As noted above, a system is a procedure that is chronological and thus followed step by

step. Each procedure (system) is created with the input of all those who will be affected by it, and will undergo revision as it is tested. The beauty of a system is that the steps, procedures, forms, agreements with other offices, etc., are designed at a time when the office is free from the demands of running a project, so that clear thinking can be applied to designing the system alone.

To define and illustrate the concept, the following list of systems and subsystems might be used to operate an in-plant training project:

- *Sales and Marketing.* The objective is to discover opportunities routinely for college-industrial contracting (the details of building this subsystem follow in the next chapter).
- *Human Resources.* The objective is to have access to a group of specialists who will deliver training and consulting services in an organized and professional manner (covered later in this chapter).
- *Information Management.* This critical system has several objectives: to provide new information, to store and recover old information, to track the progress of individual projects, to provide for consistent treatment for each company, and to integrate events within the office and within the college.
- *Fiscal Management.* This system primarily relies upon accounting procedures and is used to track the finances of each project and the office as a whole. It will also include the communication procedures to connect the office to the college's business office.
- *Project Management.* This system is the standard operating procedure for managing each project and describes (for each project) how the other systems are integrated to accomplish an event. There will be different project management systems for each type of activity (what we term "roles") your office handles. Each project is managed by a sales representative.

The diagram on page 57 illustrates how the individual systems are used and blended to do in-plant training. Naturally, other systems will be needed when you develop and operate other activities. For example, if you design and offer special seminars for professionals, you will need a system for managing and running the conference during its occurrence.

As your individual systems are developed, commit them to paper and have your colleagues review and suggest revisions. The systems will only work when all people affected by them agree on the design. Finally, place the responsibility for managing each system with one person who fully understands it and who can explain its function to others when necessary. Update the written explanation of the system so that it may be a teaching tool to train new staff. Be sure to include copies of all the forms and memoranda in the explanation.

In conclusion, systems are the established processes and procedures that you follow to accomplish tasks in such a manner as to ensure that

PROJECT MANAGEMENT SYSTEM: IN-PLANT TRAINING

Sales and Marketing System	*Information Management System*	
Information is sought for new sales leads	Company lead file produces potential lead	
	Company file opened for recording activity	
Lead followed, need found for training	Resources are searched	*Human Resource System*
Company meets and approves trainer		Trainer is found
	Proposal and contract written for company	
Company approves proposal, signs contract	Contract with trainer	Trainer agrees to contract
Training delivered		
	Fiscal Management System Project account opened to pay for materials	
Company pays costs	Company billed	
	Payment received	Trainer paid

the results are consistently correct and of high quality. The first system you may choose to tackle is the planning and organization of your office.

INFORMATION MANAGEMENT SYSTEM

As you gather the information about these consultants and instructors, you will be faced with starting another system, the information management system. The key is to begin to build files as soon as you have data and avoid designing file systems and entering data under the pressure of having to find a piece of information. The computer should be accessible to, and usable by, all staff members.

The Human Resource File

You need to be able to retrieve information about each person in several different ways; so the database management file you create should provide access by name, areas of expertise, companies in which they have served, dates of service, Social Security number, and perhaps other information. As you search for information that will complete contracts, proposals, and business office documents, it should be found easily.

The Company Contact File

Another file that you will create at an early point in organizing is the company contact file, which will document the history of your office's relationship with each firm. Beyond name and address-type information is the need to describe the type of business that is conducted by the firm as well as something about the company's structure. Names and phone numbers of the contact people, dates of each contact, and a record of the activities you have conducted for the company are necessary. You will also want to note the names and dates of the proposals and contracts that have been issued as well as a reference to other files where copies may be found. This file is important because it will be used as input for your sales decisions and for maintaining regular contact with your customer base.

Proposal and Contract File

The copies of all your proposals and contracts will be kept in word processing data files rather than in database files (such as above), because you will not need to search these files for specific information. The greatest value of this file is for preparing new proposals, which can frequently be rewrites of old ones, thus saving time. Of key importance is to name each record so that you recognize what lies within.

FISCAL MANAGEMENT SYSTEM

Tracking and monitoring the revenue and expenses of the office activities becomes extremely important if you are expected to end the year in the black. Since many colleges do expect the business service office at least to pay its own way, it becomes vital always to be able to know the financial status of projects and be able to forecast costs accurately. This is done by computer and may be managed by your office alone or by the college's business office. We recommend that the basic system be located in the business office and that a backup be maintained in your office.

The system will include a computer-based accounting process, the necessary forms, and a clear understanding of the routing procedure for

the forms. The system should also provide regular reports and have the ability to track or investigate the revenue or expense records of a single project. Probably the most important factor is for the system to allow for the creation of individual expenditure and revenue budgets, so that payables and receivables may be easily identified for each project. Avoid systems, even though easier for your business office, that lump all your expenditures into a few limited accounts. You must be able to identify all the costs associated with each activity, so that you build an accurate perception of what it costs to run a training program and what your profit really is. By the way, "profit" is not a usable term for nonprofit organizations such as colleges; so consider the term "excess revenue." Design this system with the director of your business office.

Another need for this system is to accept the expenditure of funds for a project prior to having revenue. While this sounds obvious, many not-for-profit organization accounting systems prevent expenditures until revenue is guaranteed or recorded. Frequently, you will need to buy training materials or pay for the costs of program design before the activity begins; so ensure that your system will handle this need. Again, resist a suggestion from business office personnel that you expend from a generic line item within another budget, because you need all costs assigned directly to the project.

CONCLUSION

The operations of a business service office do not differ a great deal from those of other multitask offices. Tasks are coordinated and managed using the systems described above, so that records are kept, communication is managed, projects are designed and managed, and a variety of services are offered, all simultaneously. Perhaps one of the notable differences in a business-service unit is that the office can seldom settle into a routine for very long because of the great variety of projects and activities that pass through, usually at a fairly high speed. Also, because the clients are most often within businesses, the office activity must be carried on in a manner that interacts well with commercial operations. For example, few other offices within the college will operate on a cash basis or will manage a billing or invoice system that must intersect with the business offices of other companies.

A heavy emphasis has been made in this chapter on designing and using systems. A final comment about them is that most offices use systems or regular processes to manage the work that flows through. The difference here is that you are aware of these unique and discrete processes and have spent time thinking about the way you want work accomplished. Also, while other offices without systems may accomplish tasks smoothly, they do so because individuals within the office understand what to do. How-

ever, different people may do the same task differently, which causes inconsistencies, and if those individuals leave your office, they may take the system with them.

At this point, you have been introduced to information for the organizing of your basics: opening an office and building the support systems. Within the next chapter you will begin recruiting and training the resource people who will actually conduct the training and consulting services.

SECTION III

BUILDING A SYSTEM TO REACH OUT TO INDUSTRY

VIII

DEFINING AN OUTREACH SYSTEM

The focus so far has been orientation and organization: getting ready, gearing up. On the assumption that you are at a stage where you can shift your planning energy off your organization and on to your clients, chapter 8 will prepare you to plan the outreach program. It is clearly written with a marketing perspective, a concept that was introduced earlier and will now be pursued. This approach implies that your clients, not you or other college personnel, will determine what services will be prepared for delivery.

To create a sound plan or marketing strategy you need to know about your territory or service area, and you probably have begun to gather that information with the use of your external committee. Chapter 9 will suggest data sources and methods of storing, manipulating, and applying that information.

Finally, you will require a person (possibly yourself) or group of persons to activate your marketing strategy by making actual connections with the commercial and industrial world; that is, the salesperson or representative (covered in chapter 10). Your plan must describe the efficient use of your sales team to reach the exact clients you have chosen.

THE FOCUS ON MARKETING

As explained earlier, some people define marketing in terms of just some of its parts: selling and advertising. It is possible that a few of your colleagues in other offices may believe that your new office has been created to "sell" some of the college's regular "products," such as credit courses, which are already offered in the classroom, to business. Certainly, one outcome of your activities may be to arrange for the offering of credit classes, but it will have been as a result of determining that the commercial client needed the class, not as the result of a successful credit-class "sales" campaign. Instead of just trying to get business clients to buy what the college normally produces, the market-driven orientation tries to produce what the business needs within the accepted mission of the business assistance office.

Marketing includes a number of activities, all designed to discover or anticipate the client needs, and the preparation and delivery of services to meet those needs. The system is client-controlled, not college-product-controlled. It implies that your whole office is organized and aims all its efforts at satisfying business needs, possibly at a profit. This approach does not deny the need for advertising and promotion, as these activities will be needed to help establish the college's reputation as being reliable and

useful to business. It does imply that you will be reaching out and connecting directly with business decision makers, hence the term "outreach system."

The marketing strategy suggested is a targeted marketing plan. That is, using the information gathered about your service area, you will choose, for very specific reasons, certain types of businesses and certain companies within the types at which you will aim your efforts. Realize now that you will not serve all businesses, nor should success be judged on the number of clients you serve.

OBJECTIVES OF AN OUTREACH SYSTEM

The outreach system is the operational link you build to connect the resources that the college has to decision-making individuals in business who need your assistance. Primarily, your system exists to find clients and to facilitate business arrangements with them. For such a system to be successful it will require a good deal of information about the businesses in your area. A well-organized system will satisfy a number of additional objectives useful to both your office and the college, including:

To Know Your Territory

The initial need is to gather and understand the basic descriptive data concerning your businesses and the business climate. What are the types and numbers of businesses? What is the strength of your business environment? Where and what are the major employers, and what local industries are their suppliers? The goal is to obtain a comprehensive, though not detailed, picture of the business community and be able to describe it. Not only will this information be useful in beginning to refine an outreach strategy, but it will be useful in writing grant proposals and speeches. You will have a sense of the business community, know its strengths and its major players, and be able to begin to identify parts and categories. You will also begin to identify opportunities and advantages for your office.

To Systematize Your Outreach Program

Knowledge about local business will guide in the planned use of your salespeople. If your market is large, then you will target or select a limited number of similar firms to begin with. You will ultimately want to divide the territory based on geographic or categorical factors so that the calls are made efficiently. In other words, you will organize your outreach program based on what you know about the client base you serve, resulting in an effective approach to choose and contact those companies that seem to represent the best chance for becoming clients. You will be matching the resources you have identified with the companies that may seem to need what you can offer.

To Conduct Needs and Market Analyses

Knowing something about the market will assist you in preparing plans for learning more. Eventually, you may consider working with other organizations, such as the chamber of commerce, to conduct industrial surveys for attraction or retention programs. Colleges across the United States have led community projects to bring new industry to the local community, and these projects rely on a good understanding of business environment and attraction factors.

For Promotional Programs

Ultimately, the position you will want to attain is to be able to reach the key people in most all the businesses in your territory. Having such contacts established will represent a powerful promotional channel for other activities, such as special seminars and workshops you may offer later. Certainly, the college will find these connections useful when it becomes time to establish new vocational committees or announce new programs that may impact business.

Other uses for the information will include becoming aware of the problems within the business community that may exist between companies, between companies and organized labor, between businesses and local government, or between citizen action groups and certain types of business. You will be able to chart your way through potentially risky situations when you meet with community groups and business organizations. Another benefit will result as you learn about your potential customers: you will also learn about your competition.

YOUR COMPETITORS AND THE CONCEPT OF POSITIONING

Obviously, community colleges are not the only institutions and organizations in the business of helping business. Other businesses (consulting and management), industrial and trade associations, and unions have been successfully meeting the needs of business far longer than have community colleges. Chambers of commerce regularly offer workshops to meet business problems, and hospitals offer classes and seminars on health-related topics. Accounting firms and investment offices will provide learning experiences for their clients or to attract new customers. Other educational institutions in your area, especially in metropolitan areas, may be reading this booklet in preparation for doing exactly what you are planning. In an environment where not-for-profit organizations are finding it increasingly difficult to obtain resources, many are looking at creating educational units as a method to obtain new revenues. Without debating whether such moves by companies and institutions are right, or wise, or useful, or even to be considered encroachment upon the colleges' normal educational territory, we should acknowledge that they exist and plan to deal with them.

The first recommendation we offer, when you discover who is doing what you do, is to contact and meet with them. In a decidedly nondefensive manner, acquaint them with what you are attempting to do, discover what their plans and target markets are, and explore ways to cooperate and network. As you learn about what else is offered in your area, you will come to understand the concept of positioning in the world of marketing. "Positioning" means that you will discover where your services fit within your educational market. Your office's position is the image that your customers or clients have about you, relative to competitive services. They will attempt to discover the competitive differences and advantages you hold over the others that do the same thing. When you have established a position, then you have captured a niche or a piece of the market.

The approach we recommend is generally not to compete with any other organization. Either team up with it and jointly offer the program or service, or position your service so that it is different and not competitive, or stay out of the game. The exception where you might consider competing should be based on factors of pricing (a small company cannot afford the costs of another institution, and you are less expensive) or quality (the competitor's service is not meeting the need). There just does not seem to be an advantage, especially politically, for the college to be viewed as an aggressive, competitive, client grabber. We have found that the cooperative approach, where we support other institutions, usually leads to many more opportunities. Often after a period of staff cooperation in offering workshops or running training activities, our partners request that we take over the activity so that they can pursue others. Frankly, if some other group is meeting commercial and industrial needs of a certain type, there is no need for you to duplicate efforts. There are plenty of other opportunities.

IX

OBTAINING AND USING BUSINESS DATA

The information you gather about your local businesses will be used in a couple of decision-making areas. First, you will select those businesses to which sales calls or visits will be made; and, second, you will plan the conducting of each sales call to make it fit the company. What do you need to know to accomplish these two goals?

A useful document to prepare you to make calls and gather useful information has been produced by McHenry County College, Crystal Lake, Illinois. Titled "Needs Assessment Model for Successful Delivery of Training Programs," this booklet is a sound collection of questions in a structure that facilitates interviewing. Included in this visitation phase of committee work should be an attempt by center staff to meet with any and all groups that represent the commercial world. Rotary, chambers of commerce, junior chambers of commerce, community business groups, local government, organized labor, and public-service groups all represent potential important connections.

WHAT INFORMATION DO YOU NEED?

The information must be general and descriptive so that you can obtain a good overview of all the business activity in your area, and it must be specific to the degree that it describes the individual businesses. The following list covers most of the information areas you should consider collecting:

1. Names, addresses, and phone numbers of all businesses (used to plan contact strategy by geographic territory and to identify who, what, and where);
2. Description of the product or service of each business (used to plan contact strategy by types of businesses and to learn as much as possible about the company before the first contact);
3. Names, titles, and phone numbers of the key company personnel (used to plan your strategy for contacting the right person in the company for the type of service you are offering);
4. The size of the company in terms of numbers of employees and gross sales (used to identify companies that are large enough to need and can afford what you have to offer, as well as to identify the large and important "anchor industries");
5. The health of the company, whether it is growing or is downsizing (used to determine whether the company is likely to need or be able to afford your service; also used to determine the type of service you offer, that is, training for new employees or help for newly dislocated workers);

6. The nature of the specific company, whether it is the only location in the area or in the nation, part of a larger corporation, or a corporate management center, manufacturing location, or a distribution location;
7. The nature of the customer/client base of the company, whether it sells to other companies (commercial) or directly to customers (retail), and whether it does any government work;
8. Finally, any history about the company (development, labor problems, relationships with local governments or other companies).

FINDING RELIABLE BUSINESS INFORMATION

The information you gather (your market research) will either be primary data or secondary data. Primary data, generally the most valid and reliable, will be that which your staff gathers or which you contract to have collected by another organization. It is original, and you control its type, quantity, and analysis. Secondary data is information that has been collected for some other purpose, and comes from sources that are in the business to collect and analyze business information and publish or provide it on a not-tailored-specifically-for-you basis. You should seek data through both sources.

Primary data is collected as a result of your staff's seeking information directly about either your district or a specific business. It can be in the form of surveys (mail or interviews), informal visits, or conversations with other local business colleagues. One of the most reliable sources is the chamber of commerce staff who can provide both information and opinions in addition to recommending other sources. Another excellent primary source is your local government's community development or economic development director, since these people work with business on a regular basis. Finally, your direct contact with business will allow the gathering of your own information and the establishing of your own information source.

Prior to the actual visit, stop by and request a collection of the company's printed material, especially a copy of the annual report. This material will provide a basic orientation along with a fiscal view of the company. Later, and during your first call on the company, you may begin to assemble a more complete collection. Using the list above, prepare an interview sheet to be used during the visit so that you do not miss anything.

Secondary types of data collections will be the first information you should preview and are found in a number of places. Sources include libraries, government offices, trade/professional/business associations, private business firms, advertising media, research centers in higher education, and some foundations. The following is a list of data collections that will present adequate overviews. However, note that since all secondary data sources will be dated, you need to request the most current publications. Even the best is usually 6 to 12 months old.

- *Statistical Abstract of the United States* (Government Printing Office);
- *Survey of Current Business* (GPO);
- *County and City Data Book* (GPO);
- *County Business Patterns* (GPO);
- Dun and Bradstreet business listings;
- A.C. Nielsen Company published data;
- *Encyclopedia of Associations*;
- Standard and Poor's industry surveys;
- The telephone company or Yellow Pages publisher;
- Your state departments of commerce and labor;
- *Sales and Marketing Management* ("Survey of Buying Power");
- *Manufacturers' Directory* for your state;
- *Service Company Directory* for your state.

Many companies, such as Dun and Bradstreet, will provide data on floppy disks, so that you are able to load and manipulate it on your personal computer. This is especially helpful when you are attempting to discover the more global truths about the businesses in your area. Many sources will include, for each company, the Standard Industrial Classification (SIC) code. This number, designed by the U.S. Department of Commerce some years ago, categorizes companies by the product or service they produce. As you search the data about your area using a computer, you can identify all the companies that do the same thing by requesting a list of all companies with the same SIC code. It is the best way to identify the characteristics of the groups of industries in your district. It is also handy for identifying groups of companies that would use similar production systems if you are preparing to offer specialty workshops or seminars.

All of this information is to be used as the basis for making decisions about organizing the activities of your outreach system. With the knowledge already gathered concerning the strengths of your resources, you can use the secondary sources to identify and target the companies for your initial calls. At the same time you are taking a good long look at the businesses that will get the attention of your office, you will also be choosing and training a sales team.

X

BUILDING A SALES OR VISITATION TEAM

The successes of your new office during its launch will depend directly on the person-to-person contacts that are established with decision makers in business. These individuals will listen to your presentation, converse about potential needs for training, and ultimately accept a training proposal. An effective relationship (leading toward a partnership) is begun when you or your representative makes an in-plant call to introduce the college's new services and to make a friend of this company's executive. Certainly, *you* will be making some of these calls, but the sooner you can add the services of another person or persons, the sooner you will reach more companies and increase your chances for finding training opportunities. To hire another full-time person will consume a large portion of your limited resources at a time when revenues are low; so until you can afford a full-time partner, use part-timers.

Even if, or especially if, you find yourself as the only full-time employee of the new business service office, we recommend that you assemble a small group of people who can do some of your legwork. This group will become responsible for making the initial call on the businesses you choose and eventually may accept additional tasks. These people, who will become associates of your office, will work part-time and will be paid for their efforts. One of the many benefits of using a sales staff that only works when needed is the leveraging effect they have on both your time and resources. Skillfully managed, these individuals can double or triple the number of calls you could accomplish working alone, and at a cost far below the investment you would have to make if you hired even one full-time salesperson. For example, at the business service office of the College of Lake County these senior associates are paid $30 per call plus something additional for driving their own cars. For about $10,000 they contact or recontact more than 300 companies annually. These individuals, in effect, generate their own salaries by producing contracts and income for the office.

RECRUITING A SALES OR VISITATION TEAM

The people who can best serve in this capacity may come from a human resource pool that is powerful but underutilized: individuals who are financially independent and retired. This pool is largely older—upper 50s, 60s, and 70s—and as retirees, the individuals are focused on enjoying life. Even if you do not use retired persons, many of these same principles apply to your selection of a sales or visitation team. The persons you will hope to find are those who would consider it enjoyable working with the college.

There are several channels through which you may find potential candidates. Again, the director of your local chamber of commerce may be able to recommend members or past members, or at least use the communication network surrounding a chamber to find interested people. Contact the management staff of your local senior citizens' group and ask for references, or call the personnel managers of a dozen of your larger businesses and ask who has recently retired. As a last resort, place a classified ad, though you will find yourself with little information about the respondents. Search until you have the names of a half-dozen men and women prior to interviewing. Your goal is to select no fewer than two or three people, if you are a small office, and as many as seven or eight for a larger operation. Generally, it is more efficient to select a group rather than one person at a time to facilitate the training.

You should exercise the same care in finding and recruiting these college representatives as you would for any full-time person, since they will be carrying the college's reputation into industry. Here are several factors to consider when you choose your representatives:

- Business experience, especially in industry, will permit an individual to feel comfortable talking to people much like he or she used to be. This industrial experience will help that individual to "speak the language" of production and to identify and understand problems or situations, while it will also assist company personnel to feel confidence in the college's outreach program.
- Confidence and communication skills will play a factor in an individual's ability to make a good presentation and make the company believe that your representative, and hence the college, knows what business is all about.
- Reliability and availability are important, so that you can count on assignments being met within the time allotted. (Note: One of the reasons for choosing several callers rather than one or two is for the availability factor. As retirees, these people need to feel that they are not overly committed to the degree that they can't still do whatever pleases them. The winter vacations, as well as the regularly scheduled golf game, are a fact of life that you will have to deal with. Accept them on their terms and guarantee that each will retain control of his or her own schedule.)

Those people who have demonstrated the greatest proficiency have had upper-middle and senior management responsibilities when employed. If you are able to find people who have been responsible for running manufacturing units (e.g., vice president for manufacturing, company superintendent, etc.) or engineers (industrial, mechanical, production), they represent the potential for doing much more for your operation than just making calls. However, if you are not hiring the retiring, search for other

educated and verbally proficient individuals who would like to work part-time and on a self-determined schedule.

TRAINING YOUR OUTREACH STAFF

As with all training activities, plan and prepare for developing your new team. A little extra time spent in developing a solid training program will be returned by how quickly your staff are ready to hit the streets. The seriousness with which you apply yourself to this project will be noted by these people, and will help establish that feeling of importance you want them to hold regarding their mission. Do not, in any way, display actions that may be interpreted by your sales staff as maltreatment of retirees as old and unable to do what is expected. It may help for you to think as we do: our staff represent many years of real industrial experience, much more than we will ever have, and they are a source of information and guidance found nowhere else.

Training sessions should include classroom lecture and discussion, role playing and practice, and on-the-job experience, and will probably require between 12 and 20 hours of preparation, not counting the on-the-job training part. The desired outcome of all this training is to prepare these people to know and be able to describe the college and its programs or to make references to the correct office for help. They will become real ambassadors for the college; so they must be comfortable in discussing its programs and activities. On at least 90 percent of the calls our staff make, they spend some portion of their time talking about the college generally before covering the industrial service part.

The following is an outline of the content included in the training that may apply to your college:

- *Introduction to the College.* This section includes a brief history; an overview of the structure and organization (bring in some of the administrators and let them tell about their areas); an overview of programs and activities (spend plenty of time on your career and vocational programs, since they will receive many inquiries about them when in companies); a very thorough tour; and a rigorous review of the major publications of the college, such as the catalog, the schedule, and financial aid programs.
- *Overview of the Business Services.* This section includes a review of the mission and objectives of your office; an introduction to the structure as well as presentations by the professional personnel; details about the specific services you will offer (bring in some of your resource people for short presentations); a review of office operations and explanation of procedures that they will follow.
- *The Company Visitation Procedure.* This section, upon which you should spend all the time required to attain a level of smoothness

and confidence, will include a review of the questionnaire used to gather company information (more accurately, a list of questions for which answers will be obtained during an informal interview, not a formal survey); the procedure to follow, from being assigned a company through all the steps until a report is filed (you may consider designing this procedure with your staff so that they have a structure that is most comfortable); and the semiformal presentation that should be delivered to each company contact person.

MANAGING YOUR OUTREACH STAFF

Managing your part-time staff may become one of the most enjoyable parts of your job. They tend to be optimistic and seem to enjoy just being part of the college. However, as a group they will demand regular attention, and need to feel that you are both interested in their individual accomplishments and that you depend upon them for the success of your program. Schedule a monthly meeting for this group and occasionally include other members of the college staff to help your outreach team build an on-campus network. Consider the following generic agenda for these periodic meetings:

1. Open with unstructured social time during which the group can become acquainted or renew friendships. This time will facilitate the team building necessary.
2. Review new developments and procedures within your office, spending plenty of time on discussion of new services or educational activities. If possible, ask the instructor or consultant who will deliver this service to meet with the group for questions and answers. To sell it they need to be conversant about it.
3. Discuss information about the college, reviewing the basic details and introducing new activities and programs.
4. Devote adequate time to individual reports and suggestions. This is time used to reflect on their experiences in the field, which may result in changes to your system or in helping each other be more effective.
5. Conclude with a review of their individual calendars, noting vacations, etc.; set the next meeting time and make assignments for future calls.

Since your goal is to make these staffers feel connected to your office, even though part-time, you will want to spend time on lunches, phone calls, and personal notes in order to make them feel a part of your team.

At this point, and in review, you should now have identified individuals who will, as resource persons, deliver the services; you have investigated your business environment and will be ready to choose the first few companies; and you have a trained group, along with yourself, to

begin to connect with industry.The last task before putting your new system into action is to design and produce some printed material that will assist in carrying your message.

XI

PRODUCING PRINTED MATERIAL

Printed material describing your services will serve a number of important purposes, and therefore deserves a commitment of resources to produce a high-quality piece. Your brochure must be able to augment a good sales presentation or deliver the whole message if mailed to a client. As your silent spokesperson, it should represent your office: look sharp, be well organized, and be complete in information. To achieve the high quality you need, we suggest you work with a professional designer and also have it printed at a quality print shop.

WHAT MESSAGES SHOULD IT CARRY?

When an individual has read the brochure, he or she should know:

- The name of your office;
- That you are part of your college;
- Your phone number and address;
- What are the mission and objectives of the office;
- A list of the services you deliver, and in a longer piece (a catalog), a description of those services;
- How you do business (in-plant, customized, etc.);
- The names of other companies you have served;
- The benefits to be gained by working with your office.

Since your brochure should promote a response from the reader, your emphasis should be on the benefits to the reader's company; your association with the college; the variety and quality of your services; your price; your location as a neighbor. With a sensitivity to overkill, do provide plenty of information and try to answer as many questions as you can forecast. Avoid generalizations by describing specifically the services and the successes you have attained, and "talk" to the reader as an individual rather than as a group or a company. Use the KISS (keep it simple, stupid!) principle in both language and sentence structure. Avoid having it sound academic; request assistance from an expert (business and marketing faculty, professional consultant, or business person) to make sure the brochure communicates from one business to another. Don't reinvent the wheel; collect printed material from other businesses or business service centers to use their good ideas.

SOME COMMENTS ABOUT DESIGN

Recommend to your designer that more than one color be used and that the design be appropriate to the business world. If you are able,

add a few enhancers, little appeals that might make the difference, such as a money-back guarantee if not satisfied, discounts for volume programs, and convenient payment arrangements. Finally, be sure that it can be easily mailed, which will require that it either have a mail panel (a blank side for address and postage stamp) or fit a standard envelope.

Print a reasonable number, keeping in mind that you will want to redesign it after about 18 months. Print enough to meet the needs of your visitation team, the needs of others in the college (like your president, who may leave them behind after a speaking engagement), and phone and mail inquiries. Again, make this a first-class document.

Finally! You are prepared to begin your calls on industry.

SECTION IV

REACHING OUT: SERVING BUSINESS

XII

A PRIMER ON TRAINING

Before we proceed with the business of proposing and running a training activity, it may be useful to understand more fully what training is all about. Almost all of us have many years of experience with education. The perceptions, experiences, and memories that you hold about your own education will in a large way affect how you think about training. For many, education is recalled and stereotyped as hours and days spent in classrooms listening to teachers or working on assignments, and perhaps your recollections include how bored you might have been from time to time.

Without intending to judge formalized educational systems, we believe that in-plant training should be considered somewhat different from school. One reason for the difference is that school is designed to be a comprehensive educational experience. It is created to help develop the whole person, and the amalgam of planned and unplanned curricula often seems without focus. Training may be viewed differently. The purpose of training is to efficiently and effectively prepare an individual to demonstrate a clear set of competencies or behaviors or actions. It is very specific in its expectations. Education would also include training; but also add the larger human skills such as thinking, problem solving, communication, and human relations. After a training experience it is usually possible to evaluate a trainee by requiring a demonstration of the new skill level. With education, however, it is much more difficult to measure the changes wrought by the educational experience.

The overall reason why training is conducted by commerce and industry is to improve or maintain productivity, that is, to produce more or better products or services (output) for less or equal work (input). Improved productivity is the single most important factor for keeping or making a company competitive. Training is only part of the process for improving productivity (improved processes and the use of more effective and efficient machinery and technology are the other parts), but it is the human improvement factor. Management occasionally may look to training as *the* path to improving productivity, because it is a comparatively inexpensive alternative to capital investment. As a training contractor, be wary of a company that has developed expectations of you and your team that are beyond the scope of training. To improve productivity training can be useful: to develop and/or improve the skills and competencies of individual workers; to improve supervisory and management behavior; and to develop teams for achieving goals and objectives.

As a professional trainer or contractor, you should be aware that training is about change, and change is a phenomenon that most of us overtly

applaud and covertly resist. It is generally easier to repeat the familiar and avoid courses of action that require something new. Therefore any training activity must be designed with some concept of the change that will be required of the trainee and of the impact that the change might make on his or her sense of being. In some cases it is relatively easy to organize the content of an activity but quite difficult to help people to accept and internalize the new behaviors.

Another way to categorize training is to observe the development of employees from the time of entry into the company through retirement. First is training necessary for entry into a specific job, along with the knowledge necessary to function smoothly within the company generally. At this point the employee is usually highly motivated and interested in proving his or her usefulness. Training is viewed as the best way to quickly become a valued employee. If both the company and the employee are growing, the second type of training becomes clear: to improve and update skills. Since the worker is competent at one skill level, he or she will become recognized as a natural candidate for more advanced training along with more responsibility. Again, motivation will be high and training opportunities will be valued.

The last three types of training may be less valued, and lowered motivation along with a variety of other problems may impact the training activities. The third category, retraining, can be seen as either advantageous or threatening. A workforce in transition, especially one that is adapting new technology or being forced to downsize, will feel and manifest anxiety behavior. Retraining is designed to replace old (comfortable) skills with new ones, and places the worker in the position of having to change or possibly become unemployed. Learning that is affected by fear or anxiety will be retarded in some form. On the other hand, retraining when viewed as a growth opportunity may be welcomed by workers who are ready to try something different.

Deficit skill training is the fourth category. This training often follows an event where a worker has been recognized as performing below an acceptable standard. To be identified in such a manner is not a happy experience for most of us, and emotional reactions will accompany any remediation program. This training could involve improvement of job/task skills or be aimed at addressing problems with basic skills in reading, writing, or math. Consideration for the employee's self-concept must be a high priority.

The last category is definitely problematic. Within the last few years major corporations have been forced to furlough large numbers of workers, many of whom will never be returned to employment in that company. In an attempt to facilitate this unhappy transition, some companies are offering to train people for new employment opportunities elsewhere. This has been called dislocated-worker training, and is supported by subsidies from federal and state agencies. This type of training is accompanied by the highest fear and anxiety, as workers face an uncertain future.

The delivery of training activities in any of the five categories might be similar with the exception of the receptivity factors (readiness, motivation, attitude, anxiety) that are within the learner. Design must account for the learner differences.

It is not our intention to offer information about training for any other purpose other than to alert you to factors that will affect the success of the programs you deliver. There are some conditions that you should note when preparing to offer training:

- Commitment to improving and developing the workforce must exist at all levels. It is counterproductive for management to apply a training program to an unwilling group of workers.
- Some system that recognizes and rewards growth and development is a tremendous asset to improving skills and changing attitudes.
- Training activities should focus on real skill and cognitive needs, and be directed toward useful experience with as much hands-on experience as possible.
- The trainees should feel some ownership in the training experience by being involved in the assessment and design.
- A workforce that feels that management has a direction and a sense of energy that requires and values employees who are part of the team will accept training opportunities with the best attitude.
- Careful assessment, planning, design, and delivery will ensure quality, and a quality program is most easily accepted.

We hope that this brief review of training concepts will help you position your proposal and your team's effort for the maximum impact. Now, on to the business of making your first industrial call.

SEPARATING TRAINING NEEDS FROM OTHER PROBLEMS

During your investigation you will very likely discover problems and behavior that are contributing to the difficulty but are not likely to be corrected by a training program. It is important to report these to the proper management person so that they are separated from your training business and dealt with in another fashion. Be certain that the individuals who will evaluate your training program understand that what you will accomplish in the educational activity cannot correct the nontraining-affected behavior.

Deficient behavior may include poor employee performance due to lack of interest or motivation; poor supervision; laziness; poor working environment; poor performance expectations and standards or poor measurement of same; and improperly maintained equipment or the use of equipment unsuited to the purpose.

XIII

MAKING THE FIRST CALL

After making a significant investment of time and resources in designing, learning, planning, and training, you should feel ready to make several initial company contacts. The first half-dozen, at least, should be done by you to test the environment and also test your presentation and sales skills. To set up the first calls you will begin to use the information gathered earlier about companies. You will choose several, contact them by mail, phone for appointments, and prepare for each call.

CHOOSING THE FIRST COMPANIES

The first choices ought to be made based on several factors. First, quickly review the types of training and consulting services you can deliver, noting which of them are probably your strengths. Identify those that use the strongest instructors you have in terms of experience, confidence, and in-plant people skills (they can work easily with managers and employees). With your strengths in mind, review your collection of data on local companies, seeking companies that appear to be better risks than others.

For example, if your strongest resources include the ability to do supervisory training, safety audits and training, and production-line analysis, you would search for companies that:

- Are manufacturing a product, so that you might analyze their production process;
- Seem to be growing and may be promoting line workers into supervisory positions;
- May be older plants designed without safety features (e.g., accident prevention flooring) or controlled by new or government safety regulations, so that you could use your safety expert.

The goal is to best match your strengths with their perceived weaknesses or needs. After compiling your list, contact your external committee members individually to seek recommendations for companies and also to receive comments on the list. Then, after consultation, pick six or eight.

PREPARING FOR THE CONTACT

Using all the company data you have available, begin to learn as much as possible about the company. Using the data list found in chapter 9, create a company data sheet for recording all the information you find and to which you will add additional data after your visit to the company. This

company data sheet will be used as the "hard copy" backup after the data is entered in a computerized company file. The more information you have about the company, the easier it will be to conduct the call and leave the impression of a knowledgeable and prepared service representative. Later, when you are making use of your sales staff, this data sheet will be the basic tool for assigning and preparing each person for the assigned call.

A critical piece of information is to discover and contact the right person within the company. Our experience has taught us that the persons most likely to respond favorably to a service proposal are the individuals who have had production management responsibilities. They are the people who have had problems that needed more immediate solutions and who frequently could make contractual commitments. These managers hold a variety of titles such as vice president for manufacturing, plant manager, plant superintendent, and production manager. Place a call to the company's switchboard, identify yourself as a staff member from the college, and ask who is in charge of production. Normally, after a question or two, the operator will determine for you who you ought to contact. Be certain to ask for the correct spelling of the person's name along with his or her correct title. The production manager will generally be the best first contact to the company.

A second contact person might be the personnel manager (now frequently called the manager for human resources) or, if the company is large enough, the director of training. Usually, these are poor second choices, for a couple of reasons. First, these support system managers do not often face problems that need solutions quickly, so they will listen to your presentation, gather the information, and file it for later use, sometimes forgetting. Second, they may have the additional assignment of conducting training themselves, and may feel that you are intruding on their turf and will "forget" that you are available to help. However, in times of diminishing resources, these individuals may view you as a valuable vendor who can provide reasonably priced training locally.

In choosing the correct first contact, the information above is the best general approach, but other factors may suggest choosing others in the company. For example, in very small companies, usually 30 employees or fewer, you probably ought to contact the owner or chief executive officer (usually the president), since he or she will usually have a hand in all phases of the company. If you are promoting special programs, such as hazardous waste management or microcomputer accounting, your contact person would probably be the person charged with managing the areas that include your program's focus. Spend as much time as necessary on the phone asking for information that will help identify the right person. If you clearly identify yourself as a college staff member, you will quickly reduce the natural resistance that phone operators and secretaries hold for anyone asking questions. Be frank and open with these people, as they will almost always help.

MAKING THE FIRST CONTACT

Your first contact should be a letter on college stationery, explaining who you are and that you intend to call for an appointment within a day or two. The letter should be brief, less than one page, and carry the message that the college is beginning to reach out to business and has chosen a few company personnel to interview (a sample letter is included in appendix III). At this early stage of office development you need to rely on the strength of the college's reputation and community image to open doors for you that, alone, may be difficult to access.

Within a few days phone your contact person seeking an appointment. If he or she seems amenable to your visit, then *you* suggest two possible times and dates for the meeting. Avoid asking "What's a good time for you?" since that places the burden of suggestion on the other person and makes you seem less aggressive or assertive. Besides, you want a time that fits your calendar, since you will be making six or eight of these calls at about the same time. In some cases your target client (or his or her secretary) may exhibit resistance in agreeing to meet with you. At that point two activities need to be initiated: first, ignore the nervous discomfort in your stomach, which is natural, and second, begin a mild sales presentation. This will require you to be assertive. For example:

> Mr. Smith, you sound as if you have very little time to listen to me, but the college would very much like your reaction to our new business initiatives, and I will take less than 15 minutes. I think you may be surprised at what the college is planning and especially at the level of expertise we offer. I speak for our president, Dr. Jones, in expressing appreciation for just a few minutes. How about it? Can we meet on Friday at 8:00 a.m.?

If the answer is still no, then thank him for the phone time, write him a note expressing your hope that he may say yes at a later time, and include your new brochure.

MAKING THE FIRST VISIT

With the appointment arranged, you now finish your preparation. By the way, even though you may have already spent considerable time in preparation and probably feel set to begin, you may be experiencing a little anxiety. Actually, the nervousness is similar to that which you feel before giving a speech, and, as you recall, it disappears within a minute after meeting the client. It has also been shown that a little anxiety will actually make you think faster and be more creative. In any event, the more prepared and practiced you are, the greater your confidence will be, which will reduce the uncomfortable feelings.

For the appointment, arrive five minutes early; hand your business card to the secretary at the front desk; announce your intentions; while

waiting, study any written material lying about; shake hands firmly with your target client while smiling and saying hello; hand him or her another business card; thank him or her for the time; and begin your presentation.

MAKING THE PRESENTATION

The ultimate goal for all this work and worry is to enter into a contract with a company to deliver training or consulting services. The presentation made to the company contact is the vehicle used to reach a point where a written proposal is offered and an agreement is signed. Two objectives accomplished during the presentation will lead to the contract: first, this person will need to learn enough about your college's capabilities to have confidence that you can meet your claims, and, second, the company's need for training or consulting services must be discovered. You can see, then, that the presentation both offers and gathers information, and, in fact, the giving and getting of information should be blended into a comfortable conversation. Perhaps you should perceive this process as an investigation or probe, wherein you give information about yourself and the college in order to get the client to talk about his or her company.

What follows is a generic outline with some questions that you may consider adapting to your own style.

THE COMPANY-CALL INTERVIEW

I. Introduction: Getting Started
   A. Review the progress your college has made in establishing a business service/economic development mission.
      1. Board/presidential commitment.
      2. Establishment of the office.
      3. A little about your background.
      4. A brief explanation of the test program you are running in order to get reaction to this new business service mission and to find a select few companies that need some training.
   B. Review and check the information you have gathered about the company.

II. The Interview/Probe
   A. Learn more about the company's product or service.
      1. Ask about the production process, how it is operated; mention that you would enjoy a tour of the plant if it is allowed by company policy. The goal is to learn as much as possible about what *employees* do.
      2. Ask how quality is controlled, whether it is done during the process or after the product is created.

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3. Try to get a feel for the numbers of employees involved in different parts of the company and in different parts of the production process. Here you are looking for groups of people who could later become "classes" for training.
4. Without necessarily asking directly, try to determine whether the company is growing, stable, or downsizing. Obviously, different types of training opportunities or services apply to different company environments.
5. Ask what impacts the company's success: competition, economy, the success of its customers?

B. Try to learn a little about the person you are interviewing. Discover both professional and personal information so that you can build a good personal relationship.

C. Listen for indications of problems or situations where your services might help.
1. Is the company buying new equipment, starting new production processes, or going through production changes?
2. Does the company experience a high turnover rate?
3. Is the waste percentage too high?
4. Are its customers making new and higher-quality demands?
5. Have new people been hired recently, or have operators recently been promoted to supervisory roles?
6. Is it subject to new or more stringent government regulations?
7. Again, not directly, but discover what type of relationship exists between management and the union if the company is organized.
8. Ask how people are promoted and whether new skills are required.
9. Ask if operator's manuals exist for the machinery.
10. Discover how employees are evaluated and rewarded.

D. Ask about employee training and development currently conducted by the company.
1. Discover what skills, knowledge, and procedures are needed and taught to new employees.
2. Have task analyses been conducted for jobs? How about job descriptions?
3. What basic skill levels are required by employees at different levels (reading, math, problem solving)?
4. Ask who does the training, where and when it is conducted, whether it is a formal process or done informally (on the job).
5. Discover if there is a training budget, or any resources dedicated to development.
6. Ask if outside vendors have been used for training. Lately? How successful?

III. Closing the Interview
- A. Quickly review with the client some of the key information you have discovered.
  1. Be complimentary in most of your comments.
  2. List the areas you have noted as possible training opportunities or consulting needs. Be specific.
- B. Ask if you can return with an instructor or consultant to spend time analyzing and assessing specific training or consulting needs. Set a tentative date.
- C. Explain the process you will follow.
  1. Assessment.
  2. Written proposal.
  3. Contract.
  4. Mention a cost range for a typical training activity.
  5. Review your benefits: reasonable cost, money-back guarantee, company control of training, etc.
  6. Leave on a personal note: thank him or her for the sharing of information, the openness, the frankness. Tell him or her that you are looking forward to a good college-business partnership.

Does the outline above seem too long? You will find that within a half-hour you will easily be able to cover most of it if you stay on task. Of course, let the conversation wander into areas that the client wants to talk about and keep it conversational. It should not sound like a list of questions.

Upon returning to the office review your notes and enter all the possible data into your company file. Make notes about the personal things you learned about the contact person, so that you can use them in the next meeting to build rapport. Also, make a list of the training opportunities and company needs that you noted. Contact your instructor/consultant and begin to prepare for the next call.

XIV

PLANNING AND PROPOSING ON-SITE SERVICES

You have spent considerable time making your first call on the target company. Your goals during the initial contacts have been to impress company personnel with your knowledge of their company and with business generally, and with your responsiveness and professional approach. In this chapter these goals remain important as you move toward securing a contract with the company. The next steps will include preparing for the follow-up meeting; assessing company needs; preparing a proposal and contract; and delivering the services required.

Our experience underscores one phenomenon: no matter how urgent company personnel seem when discussing a project, they will most likely move very slowly through the process. On the average, the time from the first call to the beginning of a training or consulting endeavor is six months. While they will typically move more slowly than expected, you must remain both responsive and patient. It is to your advantage to let them feel as if you are waiting on them.

PREPARING FOR THE NEXT CALL

The Follow-up Communication

Within a day of the initial call, prepare a letter and send it to each of the individuals with whom you met. In a brief manner offer thanks for the time they provided, make a brief positive comment regarding the company, mention your desire to respond to a specific potential training or consulting need, and explain when and how the next contact might occur. Approximately two days after receipt of the letter, call the contact person and arrange for the time and place of the next visit. During this phone conversation explain what you would like to accomplish during the meeting. Review, in specific terms, your understanding of the nature of the situation or problem you are going to address, and inform him or her that you are bringing your "expert" along to discuss the potential solutions you may offer.

Choosing and Meeting with Your Resource Person

One of the critical decisions you will make is to choose the right resource person for your project. Even perfect management on your part will not rectify the actions of an inappropriate consultant or instructor. In chapter 5 several comments were provided concerning identifying and

recruiting quality resource people. To those paragraphs we add several additional considerations. There seem to be two general areas for concern: first, the individual must have the knowledge and experience to respond properly to the needs of the company; and, second, your choice must fit the culture and employee performance expectations of the company environment. The first part seems straightforward. A careful analysis of the company's situation will reveal the need for specific theoretical or technical expertise, and through conversations with your person, you must determine if he or she has what is called for. It may require that the consultant or instructor actually participate in the next meeting to learn the extent of the requirement he or she will have to fulfill. Occasionally, we have had instructors disqualify themselves after a short needs-analysis meeting.

The second requirement, that the outsider fit the company's culture, is more difficult, both to explain and to measure. Part of the fit can be attributed to dressing in a manner similar to that of the personnel at the company with which he or she would be working. Another aspect is the speed at which your consultant both works and communicates. If the company is aggressive and fast-paced, your person must respond in a like manner or at least in a way that is comfortable for the company. Probably the best term that encompasses this concept is the word "blend." Your person must be able to deliver his or her expertise in a manner that convinces the company of the information's validity and simultaneously blends with the company employees. He or she must also deliver help in a manner that is pleasing and in such a fashion that it is accepted as a suggestion rather than as a directive from a know-it-all. Consideration of these fit factors early in the project will assist in avoiding personnel and human relations problems down the road.

Schedule an in-office meeting with your consultant as soon as reasonable; do not wait until too close to the company meeting, in case the consultant decides not to accept your opportunity and you must seek another. At this meeting focus on two areas as you both prepare for the company. First, describe the company in as much detail as possible so that he or she has a sense for both the operations of the company and the climate for decision making. Describe both the people (major players) and the situation or problem, and agree on what the likely solutions might be or what type of additional assessment might be done. The more your person knows going into the situation, the greater the credibility and validity he or she will engender.

Second, when you have exhausted all the information about the company and have agreed on the agenda you will follow (informally) during the company meeting, you need to present a team image during the company meeting. That is, both you and your consultant need to complement each other in the information and recommendations you make. To avoid blunders such as disagreeing with each other in the presence of the com-

pany people, and, more positively, to appear that you are combining your talents to produce the best possible recommendation, you need to discuss some tactics for communication. Repeat, so that it is very clear, that you are the project manager, the leader, and ultimately the decision maker for whatever transpires. Explain that this not a personal ego need but rather your attempt to create a synchronized team approach.

One tactic is for you to agree upon simple body language to signal when you desire his or her comments and when to be quiet or avoid the topic. Usually, simple glances will suffice. Another tactic is for you to agree that when a problem or a disagreement seems apparent, that you both step out of the room and discuss it in private, and that this be done only in extreme situations. Also agree that you will run the agenda of the meeting, including introducing new topics and summarizing points of consensus and disagreement. One taboo is to converse about price, either for the cost to the company or the amount to be paid to the consultant. Costs are dealt with at a later phase when all the requirements are identified and certainly not during the first few meetings.

For the most part, the consultant should comment only when the topic is about the situation/problem and should stay quiet most of the rest of the time. Any topic that will require some negotiation, such as costs, schedules, locations, and use of space or equipment, should not require comments from your consultant until after you two are alone. Obviously, the consultant is not a puppet, and you both must find a comfort level with each other that fits your styles; but, finally, it is you who will control the communication. Think of yourself as the director of a chorus, coordinating and moving the communication to reach the desired end, calling on the expert at just the appropriate moment for the greatest impact.

The final step in preparing for the next meeting is to gather any materials, teaching aids, articles, or visuals that might be useful to explain your capabilities and those of your consultant. Review these with your consultant and discuss the appropriate time to introduce them into the discussion. Prepare a packet of this information for each person who may be expected at the meeting, along with one or two extra. Place the information in a folder or clean envelope so that it has a professional appearance. You may want to invest in specially printed portfolios (folders) that assist in producing your professional image.

Review with your instructor/consultant the time and place of the meeting, and agree to meet a few minutes ahead of time to review your agenda and for you to be able to add any new information that may have accrued subsequent to your previous meeting. At this point, then, you are both rehearsed in terms of interacting, you both know the expected agenda, your materials are prepared, and the times are clear. You are ready.

MAKING THE SECOND COMPANY CALL

Even though you do have an informal agenda set for this meeting, it is useful to remind yourself that all your activities are still sales-oriented. You are attempting to capture the award of a contract to perform a service that you are qualified to deliver. It is quite possible that the company may also be talking to others about the same problem; so you should assume that you are working against a competitor. Whether or not you are is not important, since the assumption that you are competing will make your performance better.

Two, and possibly three, objectives should be accomplished at this second company meeting. First, you need to gather as much additional information as possible about the company and the problem so that you may accurately prepare the consulting or training proposal. Second, you want to "sell" your consultant/trainer (convince the company that your colleague is capable of doing the job). And last, you may still be convincing the company of the college's general ability to deliver services to industry. Your informal meeting agenda should be aimed at satisfying all three needs.

Conducting the Meeting

This meeting should occur at the company so that your consultant may experience the situation firsthand. Inasmuch as the meeting is being hosted by company staff, they may feel compelled to chair and conduct the events at the table. That eventuality is not a cause for concern, because they probably will be trying to accomplish much the same agenda. In any event, you may still introduce the topics that you need discussed sometime during the proceedings. You may also, tactfully, accomplish some of your agenda by asserting yourself. For example, early in the meeting you should turn to your colleague and request that he or she provide an overview of appropriate past experience and education by way of an introduction.

The following is an agenda you may consider using during the meeting so that your objectives are reached:

- During the opening of the meeting be certain that all parties have been introduced and each has identified the role he or she plays within the company and what role each will play at the meeting.
- Review the purpose of the meeting: to investigate the need for college assistance in consulting or training; to acquaint the company with the potential consultant/trainer; to plan the following steps.
- Describe the problem based on the information gathered at the first meeting and continue discussion until an appropriate time at which to introduce your colleague.
- Have your consultant introduce himself or herself with a short prepared statement, followed by questions.

- Continue discussion of the problem or situation so as to determine if further study and assessment are needed or, if not, to suggest solutions.
- Spend adequate time having company personnel describe the goal to be reached by a training exercise or a consulting activity. In specific terms they should describe how the situation will be different once the contract has been filled. This is important because your proposal will list these objectives as ways of knowing if the project has been successfully completed.
- If further assessment is needed, discuss how that is to be accomplished and when.
- To conclude, summarize the points of consensus and clarify who will do what as the next step.
- Finally, if permissible by company policy and if time permits, suggest that you would find a tour of the plant useful to help complete your education about the company.

Following the meeting or the tour, find a place where you and your trainer/consultant can spend a few minutes debriefing each other. Review your notes, adjust any differences, and make plans to accomplish the next phase of the program. Following this meeting you will probably either begin to prepare a proposal for services or need to return to the company to conduct a more in-depth needs assessment.

XV

CONDUCTING A TRAINING NEEDS ASSESSMENT

A surprisingly large number of the companies for whom we have conducted training have been fairly clear about their training requirements. After a meeting or two they were able to provide enough information for our team to prepare a proposal complete with objectives. This certainly shortens the time frame and facilitates the design of the training activities. It also places the company personnel in a good position to evaluate the experience fairly, since it is clear, from the outset, what the desired outcome is to be.

Some company staff, however, are unable to see the relationship between the problems they are experiencing and the impact that a customized training program might have. In such a situation, if the company is interested enough to cover the expenses, a formal needs assessment process should be conducted. The next few pages will review the principles for assessing training and development needs.

From our experience and brief research, we have concluded that the conducting of needs-assessment programs is not an exact science. For reasons that include both cost and time factors, the assessment process is never fully complete or comprehensive. We have also concluded that because some manifestation of the problem exists, an adequate assessment will provide enough data to sharpen the focus on the problem to the degree that a solution is apparent. The point in all this is that you do as good an assessment as time and resources permit and get on to the design of a solution.

STEP ONE: OBTAIN A GOOD OVERVIEW OF THE COMPANY

The first recommendation is to remind yourself that you cannot separate the needs of individual employees from the assessment of job duties and tasks. An attempt to describe only the specifics of a particular job or task while ignoring the employee may result in a training program that fails, because it does not fit the individual or the department and may result in a morale problem or a reduction in productivity. It is possible to gather information about the employee in a different manner than when you analyze a job or task, but eventually, during analysis of your data, you must merge the information.

During your initial discussions with the company, you should have sought several pieces of information that are basic and critical to assessing a part of the company's process or procedures. First, you should have discovered the company's ultimate goal for seeking to change the current

situation. Perhaps the company is thinking of expanding the size of its operation or of diversifying product lines. On the other hand, it may be seeking a higher level of productivity to become more competitive. It is also possible that for many reasons it must downsize its workforce to become profitable, thus having to rely on fewer employees to operate the plant. Whatever the goals and objectives, you should have a sense for what direction the company (or division) is heading. Another piece of information you may have collected is an understanding of how the company normally has handled training or human resource development. This will help you design solutions and make suggestions that are compatible with the type of process the company has used in the past, thus promoting the acceptance of your ideas. Certainly another kind of useful information to gather has to do with the production systems the company employs. Is it technologically advanced or is it trailing behind more advanced systems? It is possible that what the company may really require is a capital investment in equipment rather than a development program that attempts to produce more from a retarded system?

STEP TWO: CHOOSE TWO OR THREE APPROACHES OR METHODS TO ASSESS

A needs assessment is used to gather data about a person, process, or environment for the purpose of making a judgment about performance, efficiency, and usefulness, among other things. The very process of gathering information involving people and the things they do is problematic. Anything that seems invasive to employees or that makes judgments about them will be perceived with skepticism, at best, and possibly outright resistance. If possible, either include employees in the planning and data-gathering system or choose a method that does not require significant interaction with the workers. Later the criteria for choosing the most acceptable process will be discussed.

The dozen or so methods for assessment fall into three categories: analysis of existing data; communication/interview activities; and surveys and direct data gathering. The first group, analyzing existing data, offers several attractive advantages. Obviously, since the information already exists, it does not require schemes for collecting original data, thus saving time and resources. The most substantial benefit is that it generally requires very little interaction with personnel, thus avoiding potential disruptions and potential queering of the data. There exists, though, the real possibility that the right sort of information to best illuminate the situation or problem has not been collected. Probably, the desirable course of action is to see what does exist, and determine if it answers the critical questions, before looking at alternative data-gathering processes.

Within this category of analyzing available data are several kinds of information that may be investigated:

- *Quality reports*. The data gathered about the merit of the product or the process can provide clues to the degree of excellence that is or may be achieved. In sophisticated manufacturing plants a system called statistical process control (SPC) provides the best possible evaluation of the product and the process by analyzing both throughout the production line. The quality data is a picture of the product that may reveal where improvements might be made.
- *Job descriptions*. These lists of duties and tasks may reveal deficiencies, especially in the criteria necessary for adequate performance. These may be used later in conjunction with other job analyses.
- *Incident reports*. The description of work-disruptive or process-disruptive events, especially over a period of time, may reveal opportunities for improvement.
- *Production records*. The paper that records the progress of manufacturing or of human process is useful if, again, it is viewed over a period of time. Looking for changes that co-vary with other behaviors may disclose patterns that can be changed.
- *Employee appraisals*. The routine process of checking the performance of individuals will provide another view of the whole system. Rather than check the conduct of the individual, seek clues from several employee reports that indicate a general deficiency.
- *Others*. Seek other regularly gathered units of information about the business (e.g., employee interviews conducted when a person is leaving the business or planning documents).

The second category of methods to assess training needs is to communicate directly with the individuals involved in the process you are investigating. This is a time-efficient category because it can be done almost immediately after choosing the questions you will ask. The greatest single advantage is that during the communication you may find unanticipated data that will change your focus and move you closer to the real cause of the problem. Good interviewing techniques assist the interviewee to explore all possible areas of inquiry while presenting the interviewer with the opportunity to probe. The downside includes the chance that you will get biased or incorrect information if the people you are interviewing want to resist the process. You will also end up with more information than you desire and from many areas that are of little use, since some employees will use the communication to air gripes and personal opinions. This data is also the most difficult to quantify as you attempt to use it to reach conclusions or predict behavior.

This category includes the following methods:

- Individual interviews. This method is the least invasive, since it is most similar to the communication behavior we all exhibit daily. The interviews can be structured, that is, they can follow a series of prepared questions, or they can be unstructured. Unstructured

interviews allow you to wander more easily but may result in the missing of some key areas if you run out of time or forget.

- Group processes. The gathering of information from groups introduces a whole set of opportunities and liabilities. Individuals, when communicating within a group, will change their behavior and often be inhibited, and sometimes group members will use the group as a forum for a different agenda than you have planned. The use of groups requires thorough preparation and the possession of group leadership skills by the group facilitator. Do not just throw a few people together for a bull session, since you will mostly get bull. Groups can also produce some valuable outputs. One of the best change strategies is to promote the team spirit for motivating people to be different. Another benefit is that the group process may be more time efficient than a long series of individual interviews.

  There are a number of different group approaches from which to choose. Advisory committees, composed of a good cross-section of personnel, are quick and efficient. Structured group processes, such as the Dewey Problem Solving Process and the Nominal Group Technique, are time-tested and useful. One of the more difficult but potentially most valuable is to conduct simulation exercises wherein a group solves problems and addresses situations that are close to real without interrupting the actual production process. During the game the chance for real problems to be identified is high.

The third category includes processes to collect data through the use of surveys and inventories. As you use a wide variety of instruments available on the market, facts are collected from personnel in a formal and quantifiable manner. Usually the instruments are in the form of a booklet with a response sheet that can be analyzed to provide clues for training or consulting. The instruments are of value to the degree that the employee is open and honest. They are especially useful in discovering the prevailing attitudes and climate within a department. Another method that fits within this category is the direct observation of employee performance on the job. This is useful when the duties and tasks are easily identified and described, but is more difficult when the job involves more reasoning and communication requirements. An excellent resource for job/duty/task analysis is a book titled *Job Analysis, An Effective Management Tool* (Stephen Bemis, Ann Holt Belenky, and Dee Ann Soder, The Bureau of National Affairs, Inc., Washington, D.C., 1983).

Choosing the one or more methods of assessment is most easily accomplished when the task you seek to achieve is clear enough to generate some criteria that will be used when reviewing all the methods available. Such criteria might include:

- Time available for conducting the assessment including the requirement for how quickly the entire project must be completed;

- The involvement, motivation, and interest required and available from management and employees;
- The cost of the process both in lost production and actual expenses incurred;
- The type of information required based upon the description of the problem; and
- The validity and reliability of the process in producing information that is good enough to base decisions upon.

The advice that we pass along is to choose more than a single approach so that results may be compared for a validity check.

STEP THREE: COLLECT THE DATA

To ensure the best possible data collection, be sure to announce and explain the project ahead of time, with a chance for those involved to answer questions. Enlist the support of all groups (management, mid-managers, union, supervisors, etc.), with a promise to share the results. Plan for the assessment to be conducted in a structured and organized manner so as to minimize the disruption of the normal activities. Post explanations of how it will be accomplished, who was chosen and why, and what the results will be used for. Be sure that the sample of information you take is large enough to represent the whole department or the group that you are studying. Keep accurate records of how the assessment was conducted, noting any problems or distortions that may affect the results. Finally, conduct the assessment in exactly the manner you have announced, for any change will cause anxiety and possibly distrust.

STEP FOUR: ANALYZE THE RESULTS AND MAKE A RECOMMENDATION

If the processes you choose to investigate the need for training are appropriate, this last step will require only that you organize the data to support the obvious conclusions. If your choice of method was not on target, you will struggle with this step until you conclude that another method must be applied. The goal of the analysis is to describe in specific terms the skills and competencies that, when executed by the employees, will improve the deficit situation or remove the problem. If your methodology produced good descriptive data, then you should discover a cause-effect relationship between improper or untrained employee behavior and the problem. The missing skills and competencies you have described will become the objectives of your training program.

XVI

DESIGNING A TRAINING PROGRAM

The creation of almost all training and educational activities requires the instructor or curriculum designer to follow four basic steps. We will take a moment to review them so that you may become more skilled in working with the instructors and trainers you will hire. Actually, these individuals should be knowledgeable curriculum designers if you hire them.

DETERMINE THE PURPOSE

The first step of curriculum design is to identify the objectives that are to be reached by the trainees. In specific and descriptive terms, the way that the employee will be different is explained. As we have expressed in the previous chapters, you and company personnel will have agreed on exactly what should be learned. In fact, the reason you may have conducted a needs assessment was as a method to help determine what should be accomplished. The importance of this step is that the objectives become the criteria by which content is outlined, materials are selected, instructional activity is planned, and evaluations are prepared. You will note in the following chapter that these objectives become part of the proposal and agreement that exist between you and the company. They control all of the rest of the preparation of your training activity.

DETERMINE THE CONTENT

This second step requires that you, the instructor/trainer, and the company personnel agree on what will be taught within the training program. Step one asked for the reason why the training should be conducted. Step two asks, What will be taught? This is the process of identifying the skills, facts, policies, concepts, processes, and procedures in specific statements. It should be viewed as a selection process whereby careful choices are made about what will and will not be included. Naturally, the choices will be most affected by the purpose for the training, but the selections will also be determined by the amount of time available, the cost and affordability of the program, and the ability of the trainees to learn. Step two is almost always a compromise between fully reaching the purpose or objectives and paying the variety of costs. The process usually results in the preparation of an outline that will probably also be included in the training proposal.

ORGANIZE THE EXPERIENCES

Part one asked, Why train? Part two asked, What will be taught? The third step asks how you intend to deliver the content. What are you actually going to do with the trainees? As you would expect, much of part three will be determined by parts one and two. Other factors beyond the purpose and the content that will impact the design of your training will include the training room or environment where training will be conducted; the abilities and aptitudes of the people being trained; the talents of your instructor; the time available; and other factors, such as equipment and materials. It should be clear that there are many ways to accomplish the same objectives, and you and your instructor/consultant will have to find and fit methods or techniques that meet all the factors. Perhaps you will agree that several different approaches or techniques should be incorporated that introduce the content in several different ways, so that the different ways that individuals learn will be addressed.

What follows is a brief overview of different methods that are traditionally used to present content. They are not presented in any priority, since different methods work better for different types of content.

Use of Demonstration. This method requires the instructor to perform the activity or to show the trainee how to do what is expected. It is especially useful for operating machinery or accomplishing a task where the correct procedure is clearly evident when shown. People tend to enjoy demonstrations, since they show the real thing. This method is usually coupled with the next one.

Employee Performance. This technique requires that the person actually perform the task under the guidance of the instructor. It is the method closest to the natural way people learn—by doing. It requires much more than just demonstration followed by practice. It usually demands step-by-step instruction followed by review prior to the student's actually performing the task. This method would also include one of the most often used and abused training processes, on-the-job training. Good on-the-job training is far more practical than the go-sit-by-Mary-and-watch methods that are frequently applied. It calls for planning, explanation, and some sort of evaluation of progress.

Classroom Lecture. Probably the most familiar way that teaching is and has been done, this method is an instructor's formal presentation of the content. It is most often conducted in a classroom or lecture hall with the teacher at the front using visual aids and prepared notes. It usually involves some interaction between the instructor and the student in the form of questions or discussion, and most often is used to deliver a unit of information. It is not particularly useful for teaching manual tasks.

Use of Training Materials. A number of excellent sets of training materials may be found on generic topics ranging from supervisory skills training to specific machine operator's manuals. Provided the employee

can both read and comprehend (not a foolish question in this period of awareness of illiteracy in the workplace), the materials can be absorbed at the individual rate of the employee and at times when he or she is not on the job. Sometimes the materials are prepared for teaching the employee, and at other times they are operator's manuals that will require additional help from an instructor.

Role Playing and Real Incidents. A powerful learning method that applies to management and supervisory training is for trainees to have to deal with real situations and act as if they are being called upon to react. Cases can be presented and trainees can act or role-play through the case. Afterward the actions of the individuals can be discussed, and comments from the instructor can review the best approaches.

Computer Assisted Learning. Similar to training materials, computers can be teaching machines. A number of training programs, some interactive (computer reacts to the choices that the student makes and loops back through remedial material if necessary), are produced by training and publishing companies. Usually, the computer "courses" are aimed at generic topics such as supervision, accounting, and basic principles of some topic, and often do not apply directly to the specific training needs of a particular company. Choose these carefully, as they are quite expensive.

There are other methods that might be employed, and combinations of those listed above should be considered.

EVALUATE THE LEARNING EXPERIENCE

For most of us evaluation means taking a test, and while some evaluation does imply testing, it really includes a great deal more. Perhaps it would be useful to imagine that when the training experience is completed you are going to be asked to deliver a speech to several company personnel *proving* that what was conducted is worth paying for. What would you say? Besides the test scores of the trainees, what would the company want to know? Comments regarding the following might be included:

- Was the purpose accomplished? Was it a realistic goal to be attained in the program the way it was designed?
- Was the time allotted sufficient? Was the training environment useful and supportive? Was the equipment functional? Did the training materials work?
- Was the content and method of delivery appropriate to the trainees? How well did they do? How do you know? Were they satisfied, happy with the experience?
- How well did the instructor fit the situation? Was he or she suitable for the content? the method? the environment? the students? Did the instructor enjoy the experience personally?

To attain some or all of the data necessary to answer these questions, a variety of data-gathering mechanisms can be employed. Yes, tests for the trainees might be one way to discover how well they did if the tests reflect real competency attainment. Other methods include direct observation by both you and company employees; interviews of trainees or of trainee supervisors later on; rating surveys that ask specific questions about the experience; and comments or surveys of the instructor who conducted the training. As you would expect, using more than one method will validate the data you receive and give you a more balanced picture.

This brief review of the process of designing training programs should be considered quite shallow and only for the purpose of assisting you in communicating with your instructor during the needs-assessment analysis and the writing of your training proposal--the all-important document that fully describes what you will deliver for the company. A discussion of the training proposal follows in the next chapter.

XVII

WRITING A SERVICE PROPOSAL AND CONTRACT

The training/consulting proposal is the document you prepare and present to your client that describes in specific and adequate detail what activity you will deliver. It clarifies the responsibilities of each party so as to minimize misunderstandings, and it describes all the arrangements and agreements you have reached during the discussions that followed the needs assessment. It is a proposal in the sense that you are offering to deliver a set of services under agreed circumstances for a price. Probably the greatest value of the proposal for you is that, during the writing of the document, you must think thoroughly and comprehensively about the project. You will identify hidden problems, recognize all the costs, and specify certain conditions that will help prevent failure of the project. The proposal, while describing the training content and objectives, is not the complete training plan. The plan will be prepared by your instructor after the proposal has been accepted.

There is not a single correct format for a training proposal, and you should craft one that fits the project. Each of our proposals differs, just as each training opportunity is unique, but all proposals should be well organized and labeled to aid in its review. The proposal should be typed neatly, duplicated several times, and two or three copies placed in your office's folders before being transported to company personnel. Proposals have some common parts, each with a special responsibility as the project moves from the discussion phase to the specifics of a written document. The following identifies the parts and describes what probably should be incorporated in each (two examples of training proposals are included in appendix IV).

THE PROPOSAL

Cover Page

The first page will present the title of the training program. Spend a little time creating a good title, because it will be widely used by the company as the training is promoted and discussed. It should be shorter rather than longer, clear, and should avoid cuteness. Also on the cover page is the company name and address, your office's name and address (along with the college name), your name, and the date.

Section I: The Purpose

In a single paragraph describe the basics of the training activity, so that anyone, especially someone not familiar with the project, can under-

stand what is to occur. Identify the group of individuals to receive the training, the nature or content of the training, and what overall objective is expected to be accomplished. For example:

> To design and conduct a 10-week series of classes for ABC Company assemblers that will increase the understanding of the principles of basic electricity and lead to an increased competency in the diagnosis of electrical problems occurring in current products.

Section II: Training Objectives

This unit of the proposal will reflect in adequate detail the information gathered during the needs assessment. It spells out exactly what you hope to accomplish in behavior-specific terms, the conditions under which the behaviors will occur, and some sort of statement that identifies if the behavior has been accomplished (evaluation). The choice and writing of objectives requires a clear understanding of the data gathered in the assessment as it applies to the job and task requirements for the employee. You must identify what new and different behaviors are expected to occur following the training. You must describe in clear detail what the trainee will be able to do and the conditions under which the performance will occur and to what level or standard. Note that you are listing differences in behavior, not the content of the training program. Content will be included later in the proposal and in greater detail in the training design. In a sense the objectives describe where you want to get to, while the content is how you will travel.

You might consider identifying and reading one or two of the many excellent books available on learning objectives as you become more skilled in writing them. Also, be sure to be concise; you are not writing a proposal to a grant foundation but rather to a business.

Section III: Course Description

This section is an abbreviated description of the cognitive material to be covered on your way to reaching the objectives. Again, do not spend too much time on this section, because it will be better done by your instructor. Another consideration is that if you provide too much detail, the proposal may be used by the company to solicit other cost proposals from your competitors. A detailed description of content makes it easy for another firm to submit a cost proposal by using your description. Admittedly, a company that does this sort of thing is not one with which you would likely want to do business, but you might not know. This section may be organized in two or more ways: first, you might describe what will occur on each day of instruction; and, second, you might describe the units to be presented.

Section IV: Instructional Information

In this part you will list the name of the instructor/consultant and the titles of any training materials or books that you may be using.

Section V: Schedule and Location

Here you will spell out the times, dates, and locations of the training. Be specific by listing each day and time along with the duration of each session.

Section VI: The Memorandum of Understanding

Spend some time on this section, because it will include all the agreements and responsibilities agreed to by each party. It will have two sections, one that spells out what you will do and a second that explains what the company will provide. It is possible that a third section will be needed if the training is a joint project involving another party such as the union. The list below will help you recognize some of the parts of the agreement that should appear on paper. Again, the more that occurs in the proposal, the smaller the risk for misunderstanding.

You will agree to:

- Provide the training unit and the instructor, and conduct the training;
- Prepare, in consultation with designated company personnel, the final training plan;
- Assure that the components of the training unit are completed according to the provisions of the agreement;
- Monitor the program and confer routinely with company personnel on progress and quality;
- Modify the program within reasonable limits to accommodate changes that may be required during the training;
- Present certificates of completion to employees;
- Provide the following training materials (list them);
- Provide the following training equipment or labs (list or describe);
- Permit access to the training by an appropriate number of management personnel for purpose of evaluation;
- Register trainees on the college's registration system, thereby providing a permanent record for the employee;
- Assign grades or provide some other sort of evaluation and report process;
- Maintain a record of employee attendance;
- Add any additional stipulation, condition, caveat, concern, or memo that seems necessary for clarification;
- Bill the company only upon complete company satisfaction (this amounts to a money-back guarantee).

As noted, the company responsibilities must also be recorded, and might include the following.

The company agrees to:

- Arrange for the attendance of designated personnel and manage any personnel problems related to the training program;
- Provide an appropriate instructional space (or lab), including specified audiovisual equipment (list);
- Provide access to specified pieces of equipment (list);
- Limit the number of students (specify number);
- Sign a formal training agreement and pay agreed costs;
- Provide refreshments for each class;
- Provide appropriate data, information, and/or records necessary for the class;
- Pay for costs associated with changes requested by company personnel if appropriate.

Section VII: Financial Information

The last section of the proposal explains the costs and payment arrangements, and it is usually advantageous to break this section into two parts. First, in the cost section you will explain what the charges will be and what is being paid for. It is safe to list all the things that are included in the cost (instruction, design, materials, travel, etc.) and also to mention those necessary costs that will not be covered by the fee. For example, the company itself may choose to order and pay for textbooks, and this fact should be so noted in this section. If your quote is competitive, it may help sell the proposal if you add some additional information. For example, you might break the cost down so that per-employee or per-hour costs are noted. Deciding on a price is one of the more difficult decisions to make; some information is found below that may help.

Second, explain the desirable payment method. You may state that you will bill the company following the training and expect payment within a given number of days (30), or you may seek some portion halfway through the project. Other alternatives include asking for payment for design time, followed by payment for the training. Generally, it is to your advantage to arrange to send a statement to the company (directly to the contact person within the company), which means you take the initiative to start the payment process rather than wait for the company to decide when to pay.

THE CONTRACT

Once you have created a satisfactory proposal, you need to send it along with a standard contract. A contract is essentially a legal promise

to meet the agreement as set forth in the training proposal. A copy of a somewhat standard contract is found in appendix V as an example; however, it is recommended that your college's legal counsel prepare a contract for your use.

PRICING YOUR SERVICES

Determining a price for educational services is a process with which those of us in traditional education have little experience. Usually, tuition and fee charges are decisions make by boards, senior managers, or even state and local government units. Obviously, you may continue to use those same tuition and fee amounts when you figure what to charge a client, and, in fact, some schools prefer not to differentiate between different types of educational activities. If that happens to be the policy in your environment, then you need only be able to compare and convert the training unit to typical semester-hour-type costs.

It is most likely, however, that your actual costs, including costs for instructor, travel, materials, secretarial assistance, your salary, etc., will not be recovered by using typical tuition and fee amounts. This is the case because tuition and fees are a small portion of the college's revenue for offering courses. Tuition is augmented by state assistance and possibly local taxes. A strong argument is made for the position that commerce and industry should pay all the costs for custom-designed and specially delivered services. If you are in a position where you must decide the costs and are not bound by college tuition policy, how do you know what your service is worth? What is fair, competitive, and neither too high nor too low? To reach a price for services we suggest that you pursue two different inquiries simultaneously.

The first inquiry is to discover the real costs for the delivery of a single training activity. This cost figure will comprise two collections of financial information: direct expenditures and indirect expenditures. The direct costs are those related to the specific service you are delivering, and include the dollars for instructors/consultants, their travel, materials and equipment, rental fees, and any other expense charged for delivering that specific activity. The indirect costs are those expenditures made for running your business but not associated with a particular activity, and they include your salary and benefits and those of your staff, travel expenses, printing, duplicating, advertising, phone charges, possibly rent and utilities, and more. The total annual indirect costs you incur must be spread across all the training contracts and recovered a little at a time. If you guesstimate that you will run 50 contracts per year, then each training activity must recover about one-fiftieth of the indirect costs. Finally, a single break-even contract price will be the sum of your direct costs plus the correct portion of the indirect costs. This will give you a rough idea of what your minimum fee will be.

The second inquiry to make is to contract with a professional in the training business (either a consultant or a company trainer) and have that person gather information on the costs of different types of training that are similar to what you can deliver. These figures will reflect the local norm and will provide you with a picture of real training costs when conducted by the training industry. By the way, these figures will probably be much higher than you will charge and should be considered your maximum

Over the last four years of training experience, we have discovered a process and a range that work well for us in a midwest metropolitan setting. We figure the cost of a training program by basing it on the number of hours of training delivered times a per-hour charge. That cost-per-training-hour is between $75 and $150. We also add to that cost any unusual or high-cost items (such as having to rent or move a piece of equipment). So, for an 80-hour welding program we would price it at around $8,000 (80 hrs. × $100). To choose the cost-per-hour rate we review the cost for the instructor's salary as the prime consideration. Instructors in our office are paid between $18 and $75 per hour, with all salaries averaging about $25 per hour. The salary is determined by the availability of instructors (specialists in a new field such as robotics or software technology are rare and expensive) and the amount of experience each has. The per-training-hour method we use figures in both the direct and indirect costs. Other schools use an even more simple method. They compute the direct costs and multiply by two.

Frankly, we experimented a great deal with costs on dozens of training programs until we began to perceive what was right for us and competitive with the commercial training organizations and associations within our district. Many times company personnel, in a spirit of assistance, would tell us our charges were too low or that they would gladly pay more for the service. They were also not shy about letting us know when our costs were too high. As explained above, compute your minimum and maximum costs and arbitrarily choose a figure for the first few proposals.

FINALIZE THE AGREEMENT

The submission of your training proposal to the company may not signal the end of the proposal-writing process. The process may require additional communication in the form of negotiation between your office and the company. If the company-requested changes pertain to the design of the training program, make any reasonable alteration requested. After all, this is a company-controlled training activity. If the changes apply to the training schedule, work between your trainer and the company until a satisfactory arrangement is reached. A company concern relative to the cost of your proposal is the only place where you may be involved in real negotiation.

If personnel seem to or actually object to your quote, you must reply and argue in favor of your figure. Argument does not imply conflict but rather the use of explanation and reasoning in an attempt to persuade the company representative that what you have offered is based on sound thinking. Usually, it is enough to demonstrate how you reached the figure you are quoting, but occasionally more may be required. The next step is to ask what part of the quote seems to be out of line and attempt to reexplain your reasoning. The next step is to refigure your quote and decide if you can afford to reduce the number. Another tactic is to suggest reducing the length or scope of the program, thus reducing your cost. If the company really wants your program, then an agreeable figure will be found. If the figure requested by the company is not one that allows you to recover your costs, then withdraw the proposal. Sometimes an individual will argue about the cost as a method to avoid contracting with you. In most cases, if the company has been working with you through the assessment process and spent some time with you on designing the program, an agreement will be reached. At this point you move to the design and delivery stage.

XVIII

DELIVERING SERVICES

A finalized proposal and a signed contract represent agreement between you and company personnel concerning exactly what should occur and what the outcomes ought to be. As with any educational experience, changes will probably occur as the organized content and activities are mixed with the learners and their individual needs over the life of the training. The objective of this chapter is to review your responsibilities as the project manager and the college's agent, ensuring that the agreement is fully executed with the quality expected.

BEFORE THE TRAINING OR CONSULTING BEGINS

A short series of steps that you follow before the training will ensure that the process starts smoothly and positively. They would include:

- Ordering and obtaining all needed materials, teaching aids (films, equipment, etc.), and support services (lunch, coffee, rolls, etc.);
- Working with company supervisors to communicate the nature of the training program to the employees, including a personal letter welcoming each employee and a statement (from the company) about how important the training is;
- Attempting to discover if any negative attitudes exist concerning training on the part of the employees (most frequently this will result when friction between management and the union exists);
- Meeting with the instructor to review and discuss the finalized training program and then presenting it to appropriate company personnel;
- Inspecting the training room or environment and arranging it to maximize learning (is it quiet, spacious, cool enough or warm enough; does it have chalkboards, etc.?);
- Reviewing one last time, with all concerned, the date, time, and place of the training program (people forget . . .).

THE FIRST TRAINING SESSION

Since the first impression can only be made once, it becomes imperative that the first session start right and on a very positive note. You should attend along with a ranking company manager, and both of you should make brief welcoming comments along with necessary orientation. Again, the company person should stress the reason and importance of the training for the company and for each of the trainees. Make it personal, and make it a big deal! Next, introduce the instructor and stress

the experiences and credentials held by him or her that will demonstrate credibility. If possible, keep the climate (the feeling in the room held by the trainees) comfortable by handling questions and comments, so long as they do not get off track or introduce controversy. Turn over the session to the instructor, and, along with the manager, leave. Stay in the vicinity for 15 or 20 minutes to be certain that things are running smoothly or to answer questions if necessary.

MAINTAIN A PRESENCE

If things start well, then it will not be necessary for you to attend every session, but you will want to maintain a presence within the company. The key point is for the company to understand that you are the manager of the training project and the problem solver, not the instructor. When problems occur, you should be notified (if you are not already on the premises), and you should handle the situation. Plan regular and announced visits to the training area, visit with the instructor before a few of the sessions, sit in on the training for an entire session and parts of others, and regularly call the company contact person to discuss the progress of the class. Within a few sessions all people involved will recognize and accept your presence in and around the company. The benefit to you is a real awareness of the situation and a feeling from company personnel that you are really managing what is going on.

AVOIDING AND DEALING WITH PROBLEMS

Few contracts are fully executed without some difficulty finding its way into the process. A breakdown in any one of many steps you have traveled so far will cause you to spend some time rearranging the program or solving a problem. Poor instruction, poor employee attitudes, and inappropriate content or methodology will be cause for some anxiety. All the old and tried axioms apply: act quickly; act thoughtfully; communicate to all concerned; get the correct story of what transpired; and don't blame anyone until absolutely necessary.

The following are a few tips that we have learned or gathered from our colleagues in the business:

- Insist that the company, not you or your instructor, deal with any trainee discipline problems, and if they cannot be rectified, have the individual removed from the training.
- Insist on regular, checked attendance for every session. If several employees are unable to attend a session, cancel it and reschedule. Do not work with only part of the group.

- If, for any reason whatsoever, the company is not satisfied with the instructor, remove him or her and find a substitute. Spend very little time attempting to resell your instructor unless the problem is a small communication failure. Your can-do image and the "company controls" agreement are at stake; so satisfy the company. Fairness to the instructor is a factor measured only by the amount of compensation you must pay to make him or her feel better. If the instructor caused the problem, then make the compensation minimal and only within the limits of your contract obligation.
- When involved in an unpleasant situation, deal only with the decision-making company contact person who authorized or signed the contract. If changes are necessary, you need to be able to negotiate, compromise, or seek approval from a person who is empowered to make changes.
- Under no circumstances should you attempt to minimize a problem or attempt to convince company personnel that "it's no big deal." Act as if every problem is important and give it your immediate and visible attention.

Most companies are willing to be subjected to a few problems, so long as they believe that you are making an early response and honest attempt to correct them. In the end what matters is if the training was conducted with integrity and the purposes and objectives were reached.

AFTER THE TRAINING

We have noted in chapter 15 the need for a formal evaluation of the training. This will present a comprehensive picture to the company and provide a proper finish for the project. Of importance to you is the opportunity to speak to the company about the quality of your product and to seek or suggest the next training session. As you become more established, with several quality training programs behind you, companies will begin to call you.

SECTION V

MODELS AND SUCCESS STORIES

XIX

COLLEGES THAT DO BUSINESS WITH BUSINESS AND DO IT RIGHT

FOCUS: INDUSTRIAL ATTRACTION AND EMPLOYEE TRAINING

DES MOINES AREA COMMUNITY COLLEGE
Des Moines, Iowa
President: Dr. Joseph A. Borgen

Des Moines Area Community College (DMACC) serves central Iowa and a population of slightly less than a half million people. Its largest campus is in Des Moines, the state's largest city, with three other campuses strategically located to serve an 11-county district. This urban-suburban institution had a total headcount for fall semester 1987 of 9,200.

The College's Business Service Component

The state of Iowa boasts several community colleges with exceptionally strong economic development and business service units, of which Des Moines Area Community College is one of the finest. This college was among the first colleges nationally to appoint an economic development specialist to a senior management level, naming a vice president for economic development who directs the efforts of the Economic Development Group. This full-service unit delivers on- and off-campus customized training, professional development workshops and seminars, small business education and counseling, and job-search assistance; designs and prepares training materials, films, and videos; does public-sector training; and serves as a resource agent for other community economic development agencies.

Model Program: The Greyhound Training Project

This project was included for your review because it demonstrates the power of a two-year college to accomplish major employee recruiting and training activities within a very short time frame. It was and is the most comprehensive company service and training project ever accomplished for a business in Iowa, resulting directly in 900 new jobs and indirectly in an additional 200 to 300 jobs. The value of these jobs has been estimated by the Greater Des Moines Chamber of Commerce Federation to have an economic impact of more than $40 million. At the center of this major success was the community college, creating and coordinating a number of activities and projects.

Briefly, Greyhound Lines, Inc., chose the Des Moines area as the location for a corporate consolidation program. The company closed offices in several cities, built a new facility in Iowa, and hired 700-plus employees as it relocated its accounting offices to a central national location. DMACC made available its campus facilities for the intaking, screening, assessing, and skill testing of almost 4,000 applicants for positions to be filled at the new facility. Next, the college's economic development unit created a staff of six full-time training consultants who began the process of designing more than 60 training units, preparing job-specific instructor training manuals and audiovisual materials, conducting training sessions, and coordinating the efforts of more than 140 college staff. Each employee received a minimum of 18 hours of customized training in general office systems, followed by departmental instruction of 4 to 78 additional hours of group instruction. This was followed by on-the-job training and a series of follow-up and ongoing sessions. It was a massive and exhausting effort.

Complicating the process was the continual need to revise and redesign plans, as the company was forced to make last-minute changes in personnel assignments, numbers of classes, procedures, and project priorities as the project unfolded. Unique was the night-shift training concept, the cross-training systems, and the telemarketing program. Summarily, this was a customized-training project of immense proportion and complexity accomplished by a medium-sized community college in an extremely short time.

Factors That Made This Project Successful

This section attempts to identify the reasons that success was attained as model factors for replicating the project. College personnel were able to identify several.

First, the state of Iowa through its Industrial New Jobs Training Program was able to facilitate the funding support for the project through tax increment financing. These training dollars covered expenses such as instructor salaries, supplies, and equipment, and up to 50 percent of the workers' wages during on-the-job training. Suffice it to say that quality training services must be soundly, financially supported. Second, this project received the absolute and visible support of the senior management staff of the college. As the president clearly demonstrated the college's commitment, it created a positive climate, resulting in high motivation and high spirits. The staff believed in the project and understood its importance to the community and to the image of the institution. It was a whole-college affair, not just an economic development project assigned to a unit of the college.

Another factor of success was the identification and assignment of representatives, each from the college and from the company, to coordinate the project. These representatives were given the responsibility and

the authority to make it work. This clear assignment of responsibility with decision-making authority minimized confusion during coordination. Agreements were made by two people rather than by a group, facilitating cooperation. Additionally, roles were quickly identified and assigned to the company and to the college. The company personnel were to be considered the content experts, while college personnel managed curriculum and instructional design. Finally, authority for training-unit design was placed in the hands of the six full-time training specialists who guided each project from start to completion, again minimizing the spread of authority.

FOCUS: GOVERNMENT CONTRACT PROCUREMENT SERVICE

THE COLLEGE OF LAKE COUNTY·
Grayslake, Illinois
President: Dr. Daniel LaVista

The College of Lake County exists in a suburban environment about midway between Chicago and Milwaukee in Lake County, Illinois. It serves a population of 460,000 people who are scattered throughout 40 cities and villages, the largest of which is Waukegan with about 85,000 citizens. The county is a mix of blue- and white-collar employees, with 26 percent of the labor force traveling to Chicago for work. The main campus is on the open Illinois prairie next to a small lake in the middle of 250 acres. The college serves 14,000 students per semester (5,000 FTE) and an additional 30,000 persons in military and auxiliary programs. It has one additional small campus in Waukegan and two dozen extension sites.

The College's Business Service Component

The county's roughly 11,000 businesses are served by the college through its Center for Economic Development (CED) established in 1982. It is directed by an associate dean for economic development, who reports to a dean for community education and contract services. It has a professional and support staff of 21. Services offered through the CED include customized training, workshops and seminars, small business counseling and education, labor-market information, co-op education, JTPA programs, job-search assistance, and military education. It provides service to approximately 450 businesses annually. The CED is funded through grants from the state of Illinois and by the revenues from training and consulting services. It has an annual cash flow of more than $1 million and requires no financial assistance from the college's funds. In fact, for the last two fiscal years it returned excess revenue to the college general fund.

Model Program: Government Contract Procurement Assistance

Significant economic development may occur when a local company is able to contract with federal or state government for the delivery of goods or services. Recently, upon the award of a $4.5 million contract, one of the local industries almost immediately hired 45 new employees.

The process of winning a government contract is a complex one, and requires ample understanding of the government buying system. For starters, prior to seeking or pursuing opportunities, a company must be qualified as an acceptable vendor. After acceptance, the difficult process of finding an opportunity to submit a bid begins, which for the novice is such a formidable task that most companies never proceed. This failure occurs because the government buys millions of products from thousands of different offices, almost all of which are difficult to locate. Other difficulties such as deciphering a solicitation, preparing a bid within the federal acquisition regulations, proper bid submission, and meeting quality-control factors simply defeat all but the most persistent business personnel. Yet the government is constantly seeking new suppliers and offering wonderful opportunities for a company to expand its market.

Working with the state's Department of Commerce and Community Affairs, 22 Illinois colleges offer a full range of services that assist a company to sort through the complexity of bidding. At the College of Lake County this assistance has been refined to a model program that has resulted in the winning of more than $9 million in federal contracts within the last year. The program requires one full-time procurement specialist and the nearly full-time help of one secretary.

The process includes an intense and routine marketing and promotion campaign to acquaint companies with the services and with the opportunities for government business. This campaign includes direct calls made on local industry by a call team (see chapter 10 for information on building this team), a direct-mail program, occasional contracting workshops, and word of mouth. The specialist spends very little time involved in this part of the system and relies on other center personnel to carry the message.

Companies are provided an initial information conference where they learn, superficially, about procurement and are advised of the next steps. They are also assessed, again superficially, by the specialist to determine if they seem capable of meeting the contracting requirements. Local companies will continue to be advised if they choose to pursue contracting without the college's direct help and will be charged no fee. This help includes explanations of documents, use of the microfiche reader-printer for obtaining specifications, and contract officer intervention if the company is not receiving help from the buying office.

For a fee (currently $40 monthly) companies receive a higher level of service, which includes computer assistance in the qualifying process

and help in finding appropriate buying opportunities. Currently, the CED is computer-searching on behalf of 75 companies, each of which receives, by mail three times weekly, lists of real contracts that they are qualified to handle. These contracts are found in an electronic form of the *Commerce Business Daily* (a publication announcing what the government is buying) and in 17 other bid-announcement systems. At each company one individual is taught by the specialist to read the bid data and to make a determination on whether to pursue.

Factors That Made This Program Successful

Several factors are combined to make this program successful in an economic development sense and as one that yields revenue. First, is the dependence upon the call staff to do the initial contact with industry, thereby reserving the time of the trained specialist for actual assistance. Second, is the high motivation of the specialist and the rest of the CED staff. They genuinely seem to enjoy serving people and being involved in a visible and successful program. Third, is the development and use of the microcomputer-based system that matches companies with buying opportunities. This commercial system has been modified and enhanced to increase its speed and printing efficiency. Through this system the process of finding contract opportunities was increased at least 50-fold over the by-hand methods employed earlier. Finally, a constant stream of high-quality printed material is mailed to an ever expanding circle of companies, thereby providing more "seeking" companies.

FOCUS: CUSTOMIZED TRAINING AND CAREER PROGRAM DEVELOPMENT

GUILFORD TECHNICAL COMMUNITY COLLEGE
Jamestown, North Carolina
President: Dr. Raymond J. Needham

Guilford Technical Community College (GTCC) is a multicampus institution serving the greater Greensboro–High Point community within Guilford County. This predominantly suburban area is in a largely forested region with gently rolling hills, and is home for approximately 380,000 people. Located in the Piedmont Triad, GTCC's main campus is in Jamestown, with two smaller campuses in each of the two larger cities. The vicinity enjoys one of the largest industrial bases in the state and High Point is the furniture manufacturing capital of the world. More than 70 associate degree, diploma, and certificate programs are offered to 30,000 students annually.

The College's Business Service Component

Organized under the guidance of a dean for business and industry, GTCC's business service unit has a director, three professional staff, and support staff. The college, like most of the North Carolina two-year colleges, has been working directly with business for a long time, compared to colleges in other states. Guilford began service in 1958, and through its New and Expanding Industry Program has provided training for more than 1,500 companies and 150,000 employees. Like the preceding two colleges GTCC has a strong and varied program, which includes customized training, conference/workshop service, co-op education, JTPA training programs, public-sector training, and the ability to produce training videotapes. Small business counseling and education is conducted through a separate office under a director with two support staff and with the cooperation of a number of instructors.

Model Program: Training and Program Development for American Express

In February 1985 American Express announced its selection of a site within Guilford County as the location for its Regional Operations Center, planning to hire nearly 2,000 employees by 1988. The college provided initial consultation regarding the local workforce and local management practices. GTCC was actively involved in the development of instructor training seminars, assisted in course development, and produced training materials. All facilities and equipment for the training effort were provided by the college also, including production terminals, personal computers for computer-assisted instruction, and all equipment and supplies necessary to meet startup activities.

As the project evolved it became clear that a certificate program in consumer credit and consumer service would be most useful in supplying the company's long-term workforce needs. With financial support from the state (70 percent of costs) the college, using an advisory committee of faculty and employers, designed a Customer Service Technology Program. By the completion of fall quarter 1986, 95 students had completed the coursework.

Factors That Made the Program Successful

Probably the single most powerful factor contributing to the success of this training for American Express was the approach taken by the college as it worked with the corporation. This approach meant a total commitment to satisfying the needs of the company, both to accomplish the startup activities and training and for the long-term supply of trained employees. By establishing a client-based relationship (i.e., supply what

is needed, when it is needed, rather than attempt to sell the college's existing programs and courses), a fit was most efficiently made. This approach, sometimes called market-driven programming, results in a new curriculum that prepares students for jobs that really exist.

Another factor that resulted in the selection of Guilford as a model was its innovativeness in creating new and permanent programs for the college and the county using the immediate training needs of a single company as the instigation component. It is unique because the expenses incurred in program design and equipment acquisition were absorbed by the state as it supported a single company in basically an industrial attraction program. Because a single company decided to locate in North Carolina upon the promise of training assistance from the state, the college created a program to serve the needs of American Express, and was then left with a valuable and enduring program. GTCC has replicated this process with the Twining Tea Company in the creation of a packaging program.

FOCUS: MULTIPARTNER ECONOMIC DEVELOPMENT

LOS ANGELES COMMUNITY COLLEGE DISTRICT
Los Angeles, California
Chancellor: Dr. Leslie Koltai

The College's Business Service Component

The Los Angeles Community College District (LACCD), through its Office of Occupational and Technical Education, meets the needs of the commercial and industrial sector throughout the nine-college district. This office, organizing the business service efforts for the metropolitan district, was established in 1983, and administers programs in excess of $16 million, serving more than 200 employers and more than 3,000 workers.

Model Program: Lockheed California Company and Its Unions, the International Association of Aerospace Workers and the Engineers and Scientists Guild

Concerned about the technological displacement of workers in the aerospace industry, in 1983 Lockheed convened a task force of major aerospace employers, their unions, and the LACCD to address retraining needs. The partnership that was formed resulted in customized retraining programs in computer-numerical-control (CNC) machining and computer-aided design. These programs were further enhanced by the adoption of engineering programs at two of the LACCD colleges to ensure the reliable delivery of innovative programs in engineering.

Subsequently, from two separate proposals to the California Employment Training Panel (California's mechanism for assisting in the retraining of the workforce) $429,000 was received to fund the retraining of 144 displaced or likely-to-be-laid-off drafters and designers, and $486,000 to assist machinists and machine operators in the same predicament. In an innovative strategy the CNC laboratory was housed in a semi-tractor-trailer so that training needs could be met locally at sites as much as 50 miles apart. The success of this first venture led to the outfitting of a second trailer.

In another project, computer-assisted-design (CAD) equipment was procured through the joint efforts of the Employment Training Panel, the Lockheed Company, and Los Angeles Valley College to provide training for 40 Lockheed employees who were to be displaced due to technological change.

Factors That Made This Program Successful

Certainly the major factor in LACCD's success story with Lockheed and other companies is the partnership that has been established between the state (generally as funding agency), the colleges (generally as training deliverer), the various companies, and the unions. Rather than permit traditional rivalry to inhibit programs that save jobs and help the companies become productive and competitive, management and labor sought productive alliances that brought together the ingredients for a potent retraining program. While this model flourished in an urban and suburban environment, with large training budgets, the pattern can be used in any environment. The concept of blending the strengths of several partners can result in the assembling of equipment, funds, expertise, and structure to address problems of any size.

FOCUS: BIG-TIME COMPREHENSIVE ECONOMIC DEVELOPMENT FROM A SMALL COLLEGE

PUEBLO COMMUNITY COLLEGE
Pueblo, Colorado
President: Dr. P. Anthony Zeiss

Near the foothills of the Rocky Mountains, about a half-hour drive south of Colorado Springs, is a small, innovative, comprehensive community college with 1,600 FTE. Pueblo Community College serves a three-county area with a total population of 170,000 from a main campus and two extension centers. The city of Pueblo, population 100,000, has a workforce that is largely manufacturing-oriented (blue-collar) and a

majority of the jobs are in the low-tech category. The commitment to economic development support by this college has resulted in programs and activities that netted an increase of more than $61 million for the local economy.

The College's Business Service Component

In 1983 the college began an effort to help the community's economy by creating a center to assist small business (The Myers' Center for Small Business) and a service package for recruitment of industry through assessment and training. The Myers' Center offered both counseling and education to entrepreneurs and existing business people, which resulted in the creation of 57 new businesses and help for 71 existing small businesses. This success becomes meaningful and specific when it is noted that nearly 300 full-time and 87 part-time jobs were created, producing an economic impact of more than $14 million.

Through an aggressive industry-specific training program the college has provided assessment and training activities for 20 companies and trained 1,600 employees.

Factors That Made This Program Successful

Unlike the models illustrated above, Pueblo Community College is noted not for a specific-company success but rather for the leadership it has provided in organizing and coordinating economic development efforts for the city. Sometimes working alone and most frequently with the other economic development partners within its district, the college has been instrumental in making dramatic differences for Pueblo. An immediately obvious success factor is the leadership provided from the presidency of this small school. Through the efforts of the president and others in Pueblo, a level of cooperation was established to make it easy for industry to be served, especially in being helped to cut through the red tape, so that most problems are solved after a single contact. Another success factor, due to the college, has been orchestrated funding mechanisms for creating rapid industrial training programs. The blending, again, of state funds with JTPA funding has provided the fiscal support for this success. Finally, the aggressive entrepreneurship program from the Myers' Center demonstrates that even in a short period of time (24 months) major accomplishments can occur.

APPENDIXES

APPENDIX I

A MODEL FOR A BOARD OF TRUSTEES RESOLUTION ON ECONOMIC DEVELOPMENT

Recognizing that the College of Lake County represents a prime resource for economic development in Lake County, and that the the College is providing vital education and training to the business and labor community, the Board of Trustees pledges its cooperation in economic development and support of the following activities:

Participation in the assessment of business/industry training needs.

Readiness to make presentations, upon invitation, to firms interested in locating in Lake County.

College accessibility and availability as a frontline resource in education and training/retraining of employees at existing and new companies.

Development of on-site training programs for specific companies, where appropriate.

Participation in efforts to coordinate economic development plans and activities through meetings with local business, labor, and government leaders.

Sponsorship of symposiums and workshops aimed at creating partnerships between business, labor, education, and government leaders.

Dissemination of continuous information on college programs.

Educational counseling for unemployed persons and counseling assistance in job placement of students.

Board of Trustees
College of Lake County

APPENDIX II

The following is a list of examples of training that is customized and delivered on-site or on-campus for the commercial and industrial clients.

MANUFACTURING TECHNOLOGIES AND INDUSTRIAL SKILLS TRAINING

Advanced Manufacturing Systems/Quality Control
Computer-aided Design
Computerized Numerical Control
Robotics
Materials Handling/Transportation
Software Technology and Electronics Technology
Statistical Process Control
In-Process and Statistical Process Control
Basic Statistics in Quality Control
Vendor Quality Assurance
Just-in-time and Flexible Manufacturing
Design of SPC Experiments
Productivity Analysis

Industrial Skills and Maintenance Technology

Implementing a Preventive Maintenance Program
Reading Blueprints
Reading Schematics and Symbols
Geometric Dimensioning and Tolerancing
Electrical Systems
Microprocessor Systems
Mechanical Maintenance
Maintenance Welding
Air Conditioning and Refrigeration Systems Maintenance
Plant Safety and Policy Issues
Preventing Industrial Accidents
Industrial Safety Review
Hazardous Materials Communications
OSHA and Workers' Compensation: Recordkeeping and Requirements
Health Care Cost Containment: Employee/Consumer Education
Substance Abuse and Chronic Employee Problems
Drugs and Drug Testing in the Workplace

Training the Trainer
Cardiopulmonary Resuscitation (CPR)
First Aid

Employee Basic-Skills Training

Mastering Industrial Math
Measurements and Conversions
Industrial Reading Review
Improving Industrial Writing
English as a Second Language
Accent Reduction (reducing the accent for non-native English speech)
General Education Development
Adult Basic Education

MANAGEMENT DEVELOPMENT AND SUPERVISORY SKILLS TRAINING

Fundamentals of Supervision
Industrial Supervisory Skills
Effective Management for the Office Supervisor
Interpersonal Communication Skills
Interviewing Potential Employees
Job Training and Employee Development
Goal Setting
Planning
Delegation
Discipline and Employee Problems
Change Management
Leadership Methods
Time Management
Managing Technical People
Practical Negotiating Skills
Fundamentals of Budgeting
Finance for the Nonfinancial Manager

BUSINESS COMMUNICATION SKILLS TRAINING

Interpersonal Communication Skills

Dealing with the Angry Public
Image and Self-projection
Effective Presentation Skills
Verbal and Listening Communication Skills

Assertiveness Skills
Time Management

Written Communication Skills

Writing Effective Letters and Memos
Creating Clear Technical Reports
Managerial Writing
Creating and Producing Newsletters

Effective Communication in Foreign Languages and Cultures

Japanese Culture and Business Protocol
Chinese Culture and Customs
Accent Reduction for Bilingual/Foreign Professionals
Foreign Language Training

COMPUTER, MICROCOMPUTER, AND SOFTWARE TRAINING

Computer Hardware and User Skills
IBM Mainframe Computer Training
Introducing the Microcomputer
Keyboarding Skills for the New Users
Computer-generated Graphics
Selecting Microcomputer Software

Training on Software Packages

Symphony
R Base 5000
Appleworks
dBase III
Taking Command with dBase III
Building "Turnkey" Applications with dBase III
IBM DOS
Lotus 1-2-3
Lotus 1-2-3 Macros
Advanced Lotus 1-2-3
Graphics and Printing with Lotus 1-2-3
Framework
Multiplan
Wordstar
Volkswriter Deluxe

SALES AND MARKETING TRAINING

Fundamental Selling Techniques for the New Representative
Sales Negotiating Skills
Improving Effectiveness with a Tough Customer
Strategies for Selling Technical/Industrial Products
Selling Professional Services
Strategic Time and Territory Management
Sales Planning: Coordinating the Sales Management and Marketing Efforts
Telephone Marketing and Sales
Fundamentals of Marketing
Developing a Marketing Plan
Marketing Communications

SUPPORT STAFF TRAINING AND NONEXEMPT EMPLOYEE DEVELOPMENT

The Changing Role of the Office Secretary
The Secretarial Role in Managing the Business Environment
Communication Skills
Business Correspondence
Office Automation
Customer Service Excellence
Building the Secretary/Manager Team
Time Management
Problem-solving Skills
Stress Management
Business Math and Financial Analysis
Shorthand
Keyboarding
Proofreading
Word Processing

APPENDIX III

The following letter represents the first contact with the client and introduces both your office and the individual who will make the actual call.

January 7, 1988

Mr. Firstname Lastname
Title
Company
Address
City, State Zip

Dear Mr. Lastname,

Please accept an invitation from the College's Center for Economic Development to receive information about the training programs we have offered to Lake County's industry.

Our successes with companies such as Travenol, Cheshire/Xerox, American Air Filter, and Abbott Labs, among others, in such areas as management/supervision and advanced manufacturing technology, have been noteworthy. Through the Center the vast resources of the college are made available to [company name]. Our staff, consisting of teaching technicians in CAD/CAM, robotics, numerical control, electronics, quality control, and the like, are experienced, on-the-job professionals.

I have asked Mr. Bob Rosenquist, a Center senior staff associate, to contact you within a few days. Bob has had considerable experience in personnel administration and training with medium-sized companies, most recently with Shure Brothers, Inc. I hope you will find time to talk with him.

We have the resources, please use them. Thank you.

Sincerely,

Russ Hamm
Director, Center for Economic Development

REH/tti

APPENDIX IV

Following are two examples of training proposals (refer to chapter 17).

PROPOSAL
FOR
CUSTOMIZED TRAINING IN

SUPERVISORY SKILLS

FOR

DEXTER CORPORATION, MIDLAND DIVISION
East Water Street
Waukegan, Illinois 60085

FROM

CENTER FOR ECONOMIC DEVELOPMENT
COLLEGE OF LAKE COUNTY
19351 West Washington Street
Grayslake, Illinois 60030

Submitted by:

Adelaide Bannon
October 12, 1987

PURPOSE

To introduce and reinforce key concepts of leadership and supervisory skills for line supervisors and lead workers of Dexter/Midland.

OBJECTIVES

A. To identify and promote positive qualities of leadership.
B. To explore the role of the supervisor and identify areas of appropriate authority and responsibility.
C. To develop an understanding of the needs of peers, subordinates, and superiors, and how to integrate the varying and sometimes conflicting needs of those different groups of individuals.

D. To develop an effective and cohesive team of supervisors who can develop effective and efficient work groups.
E. To develop a better understanding of today's workforce in order to motivate and counsel them toward company expectations of productivity.
F. To understand and practice effective communication processes at all levels of the company, and to improve the flow of information internally.
G. To improve problem-solving skills and encourage creative thinking patterns among supervisors.
H. To introduce key concepts of time management and work organization.
I. To prepare supervisors for implementing goal-setting behavior beyond this training program.

CONTENT

Unit One: Introduction and Goal Setting for the Training

A discussion and identification of needs and goals for the training. Focus on individual benefits (what's in this for me?) to participants and the impact of effective supervision on organizational productivity and performance.

Intended Outcome: Through active participation in developing the goals and agenda, all members of the group will feel invested in the training series and understand their own responsibility in reaching those goals.

Unit Two: Leadership and Role of the Supervisor

The supervisor's role will be discussed in relation to management's expectations and subordinate's expectations. Participants look at various expectations of their role and identify areas of appropriate authority and responsibility.

Intended Outcome: Participants will have a better understanding of what it is that people expect and want from their jobs, from both the supervisor's and subordinate's point of view. Discussion will center on how this information can be integrated into one's leadership style.

Units Three and Four: Communication Skills

Practical application of communication skills with emphasis on listening skills and interpersonal relations. Goals for improvement will be directed toward the development of a cohesive supervisory team and productive communication between managers, supervisors, and plant workers.

Intended Outcome: Participants will actively experience and observe several of the components and concepts that contribute to the inter-

personal communication process, including barriers to communication, individual perceptions, inferences, active listening, preconceived ideas, defensive versus supportive communication, and one-way/two-way communication. Individual application of these concepts to the work setting will be stressed.

Unit Five: Motivation and Productivity

Review of leadership styles and qualities will focus on methods of motivation for individual personalities to promote positive attitudes. Identification of performance standards and the value of standards for facilitating consistent levels of productivity will also be covered.

Intended Outcome: The material covered thus far will be applied toward setting specific goals by individual participants of improved motivation and productivity. Discussion will focus on establishing realistic goals, a timeline toward reaching those goals, and how each goal is interrelated and focused toward the welfare of the organization.

Unit Six: Problem Solving

Focus on types and categories of business and work problems with an emphasis on accurate problem identification. Problem-solving skills require an adaptation of a thinking process that allows for creativity and broader vision.

Intended Outcome: Through active participation, the group will understand such problem-solving concepts as group consensus, collaborative versus competitive efforts, and creative thinking. Specific applications to the work setting will be discussed.

Units Seven and Eight: Operations: Time and Work Organization

Getting results with time management and delegation of responsibilities for more efficient work organization. Focus on setting clear expectations and guidelines for workers, and how to eliminate conflicting messages in production methods.

Intended Outcome: Participants will learn the value of good time management and personal planning. Other material covered up to this time will be applied toward specific issues faced by group members.

Final Hour of Session Eight: Commitments and Wrapup

Participants will make personal commitments to continue practicing at least one skill or method learned in this training. Training program will be evaluated and Certificates of Completion distributed to participants. Through evaluation and goal-setting process, content for a next level of supervisory training will be developed.

TRAINING FACILITIES

Classroom training facilities will be arranged at Dexter/Midland with accommodations for approximately 12 participants per session. A flip chart or chalkboard is requested for instructor use. Room setup in U-shape would be most appropriate.

INSTRUCTOR AND INSTRUCTIONAL MATERIALS

The program will be coordinated by Adelaide Bannon from the Center for Economic Development. Training will be conducted by Sandy Mauck, as approved by Dexter/Midland. Handouts and related instructional materials will be provided by the college.

SCHEDULE

Proposed training schedule is from 8:00 a.m. to 10:00 a.m. for Group A and 10:15 a.m. to 12:15 p.m. for Group B. Meetings will be scheduled on Wednesdays for eight weeks on the following dates:

October 28	November 25
November 4	December 2
November 11	December 9
November 18	December 16

Rationale: An ideal training schedule would be sessions held once a week for a period of eight weeks. The benefits of weekly sessions include: 1) continuity and the implied commitment of management to allow time for developing supervisory skills; 2) participant's attitude of seriousness toward the training as an expected job function rather than as an occasional activity; 3) opportunity for skills application and behavior reinforcement over a timely and condensed period of time (two months); 4) a better opportunity to develop a cohesive team of supervisors, as longer intervals between sessions would reduce the team cohesiveness dramatically; 5) training would be completed before the holidays.

MEMORANDUM OF UNDERSTANDING

College of Lake County and Dexter/Midland will agree to this proposal through the signing of a Master Training Agreement prior to implementation.

College of Lake County will:

1. Provide training program materials and instruction;
2. Register participants in order to establish a permanent record at the college for future reference; only the trainee will be allowed access to this record;

3. Issue each participant a Certificate of Acknowledgment upon completion of the training program (see attached sample of certificate);
4. Assist in the evaluation of the training program and instructor.

Dexter/Midland will:

1. Provide training facilities;
2. Select participants and disseminate training schedule information to participants;
3. Provide thorough and positive information regarding this training program and why it is being implemented, so that participants understand it is for their professional development and not because they are "doing something wrong that needs to be fixed";
4. Inform participants of the importance of prompt and ongoing attendance of all participants;
5. Provide input on design of the program;
6. Provide evaluation feedback.

COST

A. Cost

The cost includes:
- program design and preparation
- instruction
- instructional materials
- travel

Cost based on consultation and a total of 32 hours of training provided to 24 supervisors and lead workers:

Cost for entire project	$3,330.00
Cost per participant (24)	$ 138.75

B. Payment Schedule

Balance of total program cost is due upon completion of the training. The college will send an invoice for the total amount due.

PROPOSAL
FOR
ON-SITE INSTRUCTION IN

APPLIED ELECTRICAL CIRCUIT THEORY
CREDIT COURSE ELC 110

FOR

UNDERWRITERS LABORATORIES, INC.
333 Pfingstgen Road
Northbrook, Illinois 60062

FROM

CENTER FOR ECONOMIC DEVELOPMENT
COLLEGE OF LAKE COUNTY
19351 West Washington Street
Grayslake, Illinois 60030

Submitted by:

ADELAIDE BANNON
November 5, 1987

PROPOSAL SUMMARY

To conduct an on-site, four-credit-hour class titled "Introduction to Maintenance Electricity" (ELC 110) for employees of Underwriters Laboratories, Inc.

COURSE SUMMARY

A study of basic theory and concepts involved in the nature and use of electricity. Students will observe and analyze the performance of electrical circuits and systems in routine procedures involving the location of circuit functions and the correction of malfunctions.

COURSE OUTLINE

Class 1 Orientation, Review Powers of 10 Electrical Units and Scientific Notation
Atomic Structure, Voltage, Current

Lab 1 Orientation, Color Code

Class 2	Resistance, Types of Resistors Electric Circuit and Measurements Ohms Law
	Lab 2 Ohms Law
Class 3	Power/Power Supplies Series Resistive Circuits Kirchoff's Voltage Law
	Lab 3 Series Circuits
Class 4	Power in Series Circuits Voltage Divider Parallel Resistive Circuits
	Lab 4 Voltage Dividers
Class 5	Parallel Circuits Kirchoff's Current Law Series-Parallel Circuits
	Lab 5 First Hour Exam
Class 6	Series-Parallel Circuits Series-Parallel Circuits Voltage Dividers with Resistive Loads
	Lab 6 Parallel and Series-Parallel Circuits
Class 7	Signal Characteristics and Analysis AC Circuits Pulse, Triangular and Sawtooth Signals
	Lab 7 Scope and Signal Generator Familiarization
Class 8	Capacitance Capacitive Reactance Frequency Response of RC Circuits
	Lab 8 Mid-Term Exam
Class 9	Pulse Response of RC Circuits Exponential Curves/Integrators Differentiators
	Lab 9 Frequency Response of an RC Circuit
Class 10	Magnetism/Electromagnetism Inductance Inductive Circuits
	Lab 10 Magnetism/Inductance

Class 11 Inductive Reactance
Frequency Response of RL Circuits
Pulse Response of RL Circuits

Lab 11 Frequency Response of RL Circuits

Class 12 Transformers
Transformers
Resonance

Lab 12 Second Hour Exam

Class 13 Parallel Resonance
Bandwidth and ½ Power Frequencies
Filters

Lab 13 Resonance

Class 14 Filters Band Pass/Band Stop
Filter Response Characteristics
Filter Problems

Lab 14 Filters

Class 15 Meter Movements
Voltmeters
Ohmmeters and Meter Problems

Lab 15 Meter Movements

Class 16 Final Exam

INSTRUCTOR AND INSTRUCTIONAL MATERIALS

CLC faculty member, Tony Gundrum in Electrical/Electronics Technologies, will provide instruction. Mr. Gundrum received his B.S. and M.S. degrees from the University of Wisconsin.

Textbook for the course is *Principles of Electric Circuits* by Thomas L. Floyd. Cost of the text is $37.95 + $2.47 tax = $40.42.

Laboratory space and materials can be provided by CLC, or a lab space and equipment can be furnished by Underwriters Laboratories. Equipment needed includes:

- digital or analog voltmeter
- DC power supply (0-20v variable)
- AC signal generator
- breadboard
- variety of resistors, capacitors, inductors
- oscilloscopes

The setup of 110 workstations for 20 participants in the course would accommodate the need for lab space and equipment.

PROPOSED SCHEDULE OF CLASSES

This four-credit-hour course includes 150 minutes of lecture (2.5 hours) and 100 minutes of lab (1.66 hours).

If lecture and lab can be scheduled at UL facilities, the schedule could be established as follows:

Tuesdays	2:00–4:30 p.m.	Lecture
	4:45–6:30 p.m.	Lab

Beginning January 19, 1988
Ending May 10, 1988

If lecture is to be held at UL facilities and lab is to be held at CLC, the schedule could be established as follows:

Tuesdays	2:00–4:30 p.m.	Lecture (at UL)
Thursdays	5:00–6:45 p.m.	Lab (at CLC)

COST

To hold this class on-site at UL facilities, a minimum enrollment of 20 is expected. The cost to each individual is $108.00 ($27 per credit hour), plus $40.42 for the book, plus a lab fee.

An additional fee of $500 is assessed for management of this course as an on-site training program.

With a minimum enrollment of 20 people, the projected costs are as follows:

Credit Fee	$108 × 20 =	$2,160.00
Lab Fee		to be determined
Management Fee		$500.00

Book fees will be paid by the individual.

REGISTRATION

Most participants in this course will reside outside CLC's district. Since the company also is not a part of CLC's district, special arrangements with Oakton Community College will be made.

Upon the start of this course, participants will be asked to complete a CLC entrance application and a course registration form (the usual procedure for any credit class). Those people who do not reside in CLC's district will be asked to complete a Joint Agreement Form, which CLC will request in advance from Oakton Community College, McHenry Community College, or Harper Community College, if appropriate.

CLC's Admissions Office will send those Joint Agreement forms to the appropriate college for approval. Once approved (as will be arranged

in advance), participants will be registered and a bill for tuition payment will be sent to each individual.

To facilitate this Joint Agreement approval, this class, ELC 110, will be considered an elective class in the Associate of Applied Science (A.A.S.) degree program for Industrial Electrician.

The transferability of this course (or any course) depends upon an individual's degree objective. For our purposes at the present time, the degree objective will be the A.A.S. for Industrial Electrician. After this course or other courses are completed, the degree objective can be changed to meet the individual's needs.

TRAINING AGREEMENT

Upon finalization of the schedule, location, and cost for participants, a Training Contract will be prepared by CLC for approval from Underwriters Laboratories, Inc.

APPENDIX V

Following is an example of a typical contract.

COLLEGE OF LAKE COUNTY
GRAYSLAKE, ILLINOIS

MASTER AGREEMENT FOR TRAINING

The College of Lake County, through its Center for Economic Development, hereinafter referred to as "CLC," agrees and sets forth the following conditions, to provide specified training or consulting services for those persons identified as being eligible for enrollment under this agreement in _____ _____ delivered and administered by CLC. Said performance of the training or consulting function herein described shall result in the remuneration of CLC from the funds of _____, located at _____, in an amount as stated in this agreement.

Further, CLC, a state accredited community college in the public system of community colleges of the State of Illinois, hereby states the performance of all training or consulting shall be in accordance with the laws of the State of Illinois and the policies and procedures of the State and local Board of Trustees of CLC:

1) Admission to a training or consulting program will be in accordance with admission procedures stated in the CLC catalog as approved by the CLC Board of Trustees.
2) Initial student placement in the training or consulting program shall be determined by CLC as stated in established college enrollment procedures.
3) Students in the training programs may be separated from enrollment at the college and the specific programs in accordance with established college policy.
4) CLC agrees to provide to the contracting agency named above, and other college approved agencies, such reports and information as necessary for the accountability of the funds to facilitate program and individual participant progress reports, so long as the release of said information is not in violation of college policies, or other pertinent state or federal statutes, rules, regulations, or guidelines.

Further, CLC agrees to provide training in the following areas:

COURSE TITLE **DURATION**

and to provide only the services specified in this document.

Further, the parties to this agreement state and agree that the above detailed training and consulting services shall transpire and a sum of _____, shall be paid to CLC within thirty (30) days after completion of said training and consulting services.

TOTAL COST TO THE CONTRACTING AGENCY _____

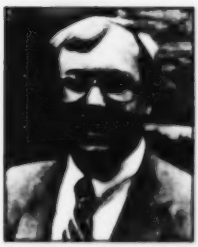
_____ Duration of Contract _____

Location of Program

This agreement is hereby executed this ____ day of _____ , ____ as verified by signatures of the following officials representing the respective agency/agencies and is valid through _____ .

COLLEGE OF LAKE COUNTY	CONTRACTING AGENCY REPRESENTATIVE
_____	_____
DEAN, COMMUNITY EDUCATION & CONTRACT SERVICE	NAME
_____	_____
DIRECTOR/ASSOCIATE DEAN	POSITION & COMPANY
_____	
DEAN OF BUSINESS AFFAIRS	

INSTRUCTIONS:
Prepare four copies. Forward white copy to Business Office, yellow copy to Center for Economic Development, pink copy to Contracting Agency, and gold copy to Director/Associate Dean.



Russ Hamm is currently dean of community education and contract services at the College of Lake County, Grayslake, Illinois, where he has been an administrator for eleven years. His experience of note was as director of the Center for Economic Development, the college's unit for serving business and government needs. Hamm served as the founding chairman of the Illinois Community College Economic Development Association, an organization that successfully coordinated the efforts of all thirty-nine college districts in economic development. Most recently he has served on the National Council for Occupational Education's task force on Human Resource Development: "Productive America" Project. He has been a faculty member in speech communication, division chair, and associate dean. Hamm is midway through his Ph.D. at the University of Illinois, Chicago.

Lynn Tolle Burger is currently the director of economic development at the Illinois Community College Board, where for the last five years she has been responsible for planning and coordinating economic development and job training programs with the Illinois public community college system. Burger also serves as executive coordinator of the Illinois Community College Economic Development Association. Burger has a bachelor of science degree in psychology and a master of science degree in community development and education from Southern Illinois University at Carbondale. Her background also includes five years as an economic development specialist with the Illinois Department of Commerce and Community Affairs as well as experience as the executive coordinator of the Illinois Downtown Development Association, as a program planner and grantsperson for Rend Lake College, and as a planning assistant for a regional development commission.

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